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ABSTRACT

Training in the retail sector throughout the 12 European Community (EC) member countries was examined through in-depth case studies of 55 retail firms that were selected as representing a wide range of firm types (19 multinational, 36 national, 4 cooperative, 7 family-owned firms), forms of retailing (department stores, supermarkets, and chain and independent specialized stores), firm sizes (ranging from firms employing fewer than 100 to more than 10,000 people), and subsectors (food, nonfood, both). It was discovered that priority is still being given to training newly recruited employees, especially potential managers. A new emphasis on training as part of a global commercial strategy and concomitant new emphasis on training the whole staff were evident. Most curricula were found to be based on a modular principle. An increase in the number of training activities in retail firms and a shift toward more strategic use of training as part of firms' human resource policies were discovered. Few data on training costs and efficiency were available, and the need for more systematic collection of factual data on training in the retail sector was evident. (Appended are seven tables of statistical data and the names/addresses of the study advisory committee members.) (MN)

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ED 389 869

FORCE
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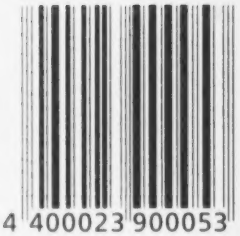
European Commission

EUROPEAN REPORT

RETAIL SECTOR



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TASK FORCE Human Resources, Education, Training and Youth

CE 070 343

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TRAINING IN THE RETAIL SECTOR

A SURVEY FOR THE FORCE PROGRAMME

drawn up by

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FOREWORD

The FORCE programme for the development of continuing vocational training in the European Community was adopted by the Council of Ministers on 29 May 1990 and launched on 1 January 1991.

Evolving from the growing recognition at Community and national levels of the strategic importance of continuing vocational training in the face of accelerating economic, social and technological change, FORCE was designed to achieve Community-wide impact on its quality and availability: to encourage increased investment in training in enterprises and to promote wider access to training for employees.

FORCE then has a twofold aim: to ensure that companies benefit from the skills and qualifications they require to maximise their economic performance, and to promote recognition of the training needs, rights and aspirations of the individual worker.

At the core of FORCE is the principle of the transfer of knowledge, experience and know-how throughout the Community. Based on active transnational partnerships between companies, the social partners and training institutes, FORCE projects – some 430 to date, with 3,500 partners – focus on the development and dissemination of innovative training management, techniques and materials, and the analysis of enterprise training needs. Research activities – sectoral surveys, analysis of contractual policy, the statistical survey of continuing vocational systems and practices in all their diversity, and a substantial fund of information for both sides of industry, companies, and policy-makers at all levels.

Together these activities are creating a network to test, assess and disseminate good practice and innovation which respond to the real training needs of companies and the workforce; and, what is more, to promote mutual understanding of national diversity and contribute to the greater effectiveness of continuing vocational training mechanisms and their capacity to respond to changes in the European labour market.

The survey of training plans in the retail trade sector is the first product of FORCE's research strand. The Task Force Human Resources wishes in particular to thank CIREM and the central team as a whole – Landesinstitut Sozialforschungsstelle Dortmund, CEREQ and Institut voor Toegepaste Sociale Wetenschappen – for the quality of their methodological concepts and European coordination, and the national Institutes for their work in a new area of scientific exploration. The survey is also the product of a fruitful association between the Commission and CEDEFOP and we are grateful to the latter for their indispensable methodological and technical assistance.

Finally, the active participation of companies and the involvement of EUROFIET and EUROCOMMERCE have been essential for the successful completion of this survey, and the Task Force Human Resources wishes to thank them warmly for their cooperation and support. We hope that the findings will be the starting point for extensive further discussion and promotion of skills, qualifications and high-quality training activities in the retail trade sector.

G. KINTZELÉ
Official responsible
for FORCE Programme

I. GRIEVE
Assistant FORCE
Programme

PREFACE

This study has been carried out for a twofold reason: to provide the retail sector and its organizations, social partners, public administrations and training bodies with a view of developments in the sector and to provide interesting and practical examples of continuing in-company training.

Using 55 case studies we have tried to demonstrate the multiplicity of approaches and solutions found by enterprises in confronting training needs.

The analysis of the sectoral context which constitutes the first part of the report and the case studies which make up the second part, revealed that the low level of qualifications of manpower employed is currently regarded by a number of enterprises as an obstacle to improving their image, to ensuring long-standing customers and consequently as an obstacle to their competitiveness. A number of companies provide training which surpasses the minimum required to carry out the tasks.

Innovative solutions have been formulated by enterprises regardless of their size, SME's and their associations have been equally as innovative as larger firms.

Nevertheless it would seem that firms' efforts in training, particularly when it is not aimed exclusively at senior management, is closely linked to the type of firm – specialized shops, supermarkets, hypermarkets, discount markets, etc. – and to the economic climate. Retail trade is highly dependent on consumer figures and purchasing power.

This report and the twelve national reports which precede it must be read in the context of these two factors.

In recession, reduced spending dictates the policies of retail enterprises which reduce staff expenditure and consequently training.

The reader of the European and the national reports will find enough information in order to place the case studies in the sectoral context and in the training contexts of the individual countries. However, the reports formulated by certain Member States reflect the changes which the training systems are undergoing. It will be interesting to examine possible repercussions of these reforms on sectoral training.

As far as possible we have attempted to do so with the collaboration of the national rapporteurs but this has only been possible to a limited extent on account of the very recent nature of these reforms.

This can only provide a partial explanation for the fact that the formalized initial training systems and the recruitment practices and in-company training are in general not closely linked.

Regarding continuing in-company training it could be said that this recent increasing interest in training can be accounted for by new sales concepts which focus largely on the customer and on sales service provided. Thus, new categories of employees are becoming the focus of training as for example shop assistants, cashiers, even part-time staff which previously were little affected by training activities.

The more interesting case studies from the point of view of the FORCE programme are those, small in number, for which training policy is an integrated part of human resources management. In the sector where there is a high degree of mobility and where salaries are rather low and where there is often recourse to part-time and poorly qualified staff these case studies are of particular importance.

This report is the result of research work carried out in 1991 and 1992, coordinated by CIREM, the main contracting party, a central research team and CEDEFOP.

The report also reflects the endeavours of a number of political bodies such as the members of the FORCE committee and the European Secretariats of EUROCOMMERCE and EUROFIET, the monitoring group made up of the representatives of the social partners all of which closely monitored its progress. National sectoral federations also assisted in the classification of firms, in interviews and in evaluating the reports at national level. The FORCE national coordination units nurtured contacts between research staff and the sector by organizing meetings at the beginning and end of the project as well as by providing the necessary information throughout. The success of the project has also been due to the research workers who conducted the survey and who showed both initiative and constraint in adhering to the methodology agreed and to the 55 firms which agreed to participate in the survey and have imparted to both us and the reader their experiences and current practice. Thanks also goes to their staff at all levels in the firms whose cooperation in this survey has greatly added to its relevance.

To all involved I wish to express my sincere thanks for their collaboration. I hope that the thirteen reports form at least a modest contribution towards promoting continuing training in the sector.

On behalf of CEDEFOP I wish to thank Mr de Vadder, member of the CEDEFOP Management Board and representative of FEDIS, for his active interest in our work and the directors of CEDEFOP for their support throughout.

Tina Bertzeletou
Project Coordinator

Corrado Politi
Deputy Director

ACKNOWLEDGEMENTS

Our sectoral study on continuing training in the European retail sector, was carried out within the framework of the EC FORCE programme, under the responsibility of the Human Resource, Vocational Training and Youth Task Force. George Kintzelé and Judith Grieve have helped us greatly in our work, with their lively interest and numerous initiatives.
Throughout the process, both on domestic and Pan-European levels, the social partners involved in the sector were consulted. With their proposals, the great majority of which have been incorporated into the report, they have made a significant contribution to improving its overall quality. We would like to thank the representatives of the European associations of social partners, EUROFIET and EUROCOMMERCE for their help.
The case studies formed the main bulk of our work and would have been impossible but for the support and assistance offered by the companies or associations selected in the different countries, the management thereof and the workers' representatives. Throughout the case analyses, we have respected their anonymity. However, here we would publicly like to offer our thanks to:

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- ALBERT HEYN
- ASDA
- B & R LUNT, THE PHARMACY
- CACTUS
- CEMASCE
- CENTRUM ALEX/KAUFHOF
- CLERYS AND CO.
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- CONTINENT
- COOP E.G.
- CHAUSSURES ANDRE
- DANSK SUPERMARKED
- DELHAIZE DE LEEUW
- DELFIPAR
- DESPAR
- DISTRILOIAS
- DOCKS DE FRANCE
- DYCKHOFF
- EMPORIOSAGOKIKI
- EROSKI
- ESB RETAIL
- PHOTO TEAM
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- GALAXIAS
- GALERIAS PRECIADOS
- GERPLEX
- GROUPE MESTDAGH
- GRUPPO PAM
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- MARKS&SPENCER FRANCE
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- MARKS&SPENCER ITALY
- MATCH NORD
- MINION
- MINIPREZO
- OVD/TSA
- P&C NEDERLAND
- PRENATAL
- RINASCENTE
- SALISBURY HEALTH FOOD
- SPAR GERMANY
- SPAR NEDERLAND
- SUPERQUINN
- SYNOPTIK
- SYSTEME U
- VEROPOULOS BROS.

For me, the level of cooperation with the national report researchers and the members of the central team, was one of the most agreeable professional or personal experiences I have ever had. The Central Team was composed of Oriol Homs, Marisa Méndez-Vigo (from the main contractor CIREM, Barcelona), Olivier Bertrand (CEREQ, Paris), Harry Van den Tillaart (ITS, Nijmegen) and Wilfried Kruse (SFS, Dortmund). I would like to thank the national scientific partners Olivier Bertrand (F), Michael Bannon (IRL), L. Bragard (B), Jan Denys (B), Joseph Hassid (GR), Gertrud Kühnlein (G), Hanne Hartvig Larsen (DK), Joaquim Lavandinho (P), Patricia Mattei (I), Oriol Homs and Marisa Méndez-Vigo (E), Harry Van den Tillaart (N) and Janet Toye (UK). We were also lucky enough to be able to count on the most valuable assistance of Tina Bertzeletou (CEDEFOP). From CIREM Barcelona, as main contractor for the entire survey, I would like to underscore furthermore the logistical work of Marisa Méndez-Vigo, the administrative work done by Josep Giró and the translation work from María José Boix. From the centres which participated in the whole survey, members of EURONET:Work & Education are the following: CESO I&D (Lisboa), CIREM (Barcelona), HIVA (Leuven), ITS (Nijmegem) and SFS (Dortmund).
A European survey of such dimensions implies much travelling and time abroad and one would think those engaged in the work would be highly independent people. However such was not found to be the case. It was surprising to see the contribution made by the researchers' families, with the support they offered and the way they put up with all of the inconveniences of the different activities.
Once completed and drafted, one is never satisfied with the results of any survey. The empirical data collected seems far too abundant to restrict its expression to such a limited framework. The debate our report has already stimulated confirms that we have truly made a contribution to the understanding of what is currently taking place in the area of human resource policy in the retail trade in Europe. Thus, the efforts of so many have not been in vain.

Dr. Wilfried Kruse
Scientific Coordinator

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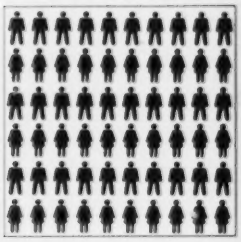
PART 1:



1. INTRODUCTION

1.1 Objectives

1.2 Defining the sector

1.3 Defining continuing training

1.4 Methodology

1.5 Selection of case studies

1.6 The context

1.7 Performance of the survey

1.8 Issues of comparability

2. NATIONAL CONTEXTS IN THE EC COUNTRIES

2.1. National contexts and evolution

2.2. Employment, skills and the workforce

2.3. Training

1. INTRODUCTION

1.1 Objectives

This report has been drawn up within the framework of the FORCE programme, the main objective of which is the promotion of more efficient investment, aimed at achieving a broader level of access to continuing vocational training in companies, with the active participation of all the partners concerned: employers, workers and governments. From the measures at its disposal, the programme has included sectoral surveys, aimed at identifying and analysing some of the best and most significant projects undertaken by enterprises in the 12 member states.

The sectoral studies were specifically expected to deal with the following points:

- Any plans the retail trade firms may have developed for the continuing vocational training of their employees. Do they adopt a global approach to training issues?
- How are such plans worked out and how do they assess training needs ?
- What is the target population? Are all the employees involved, including women and part-time or casual workers?
- To what extent do training programmes meet both the workers' individual needs and those of the retail firms?
- What is the cost of continuing training ?
- Are attempts made to evaluate the results and undertake some kind of cost-benefit analysis ?

Retailing was selected as the first sector to be analysed, so this study may be considered an experiment or project, testing the validity of the approach before extending it to other sectors. The performance of the study raised a number of conceptual and methodological issues which, within the specific context, deserve some discussion.

1.2 Defining the sector

A sectoral approach was adopted by the Commission as part of the FORCE programme and was therefore included in the terms of reference. It can be justified as a useful way to identify and analyse individual training projects and assess their meaning within the national context, since, if located in the same sector, individual projects are likely to appear more homogeneous and understandable. The following analysis shows that there is, in fact, a fair amount of diversity within the retailing sector. However, some measure of homogeneity remains since, whatever the form of commerce, all retailing firms perform the same type of function; they compete with each other to a great extent and can, therefore, be considered inter-changeable. Use of a sectoral approach is therefore justified.

We then had to tackle the task of defining the limits of the sector which, as will be seen below, vary from one country to another. The restrictive definition adopted in the terms of reference excludes car and motorbike sales and petrol stations, thus avoiding any possible confusion with repair shops.

1.3 Defining Continuing training

The report raises highly significant issues regarding the definition of what at first might seem simple concepts, i. e. training and continuing training. Case studies have indeed shown that the dividing line between training, information and other activities aimed at achieving worker participation and involvement is not particularly distinct in the retail sector. It is therefore important to be able to refer to a clear definition. Another FORCE project, a statistical survey of continuing vocational training in companies, has adopted the following definition for its preliminary work: "A structured activity, financed wholly or partly by enterprises, directly or indirectly, in order that the persons employed by them might improve, acquire or maintain their job-related skills, knowledge or qualifications from time to time throughout their working lives"[1].

Another limitation concerns the relationship between initial and continuing training. According to another preliminary report related to the same programme[2], initial education and training take place either immediately or shortly after compulsory schooling. Education and training taking place later, after an interval of about six months, may be considered as continuing training.

In principle, these definitions broadly correspond to the area covered by this study. But in current retail practice, as observed in the case studies, it has often been difficult to draw a line between a restricted and a broader concept of training. To what extent should short-term and informal sessions be considered as training, or information, or involvement of workers in the firms' commercial policies? This appears as a fundamental issue as conflicting views have been expressed on the amount of training required and on its value to employers and employees. The problem of defining continuing training, not only in terms of duration but also content, is a hard one to tackle as it involves the production and reproduction of qualifications – understood as a fairly complex social process.

It is sufficient simply to look at the three most significant features of qualification:

- Qualification is conceived of as the core notion between training and employment, by which the individual is able to move from one system to the other.
- Qualification is conceived of as the notion

[1] Meeting of the working group "Continuing Vocational Training Survey", held on 19 May 1992, Eurostat DOC.E1/812/92

[2] Tableau de bord de la formation professionelle continue. Rapport intermédiaire. FORCE, 1991

which enables individuals to relate to their workplace.

- Qualification is conceived of as a process of implicit or explicit negotiation between the social partners.

In the light of the above, the concept of qualification, and continuing training, must be analysed from two different points of view: the subject and the job itself. Thus there is always a kind of tension between the highly individualistic approach, limited to the requirements of the individual company, and the more general approach, aimed at potentiating worker mobility and flexibility.

In view of this problem, we decided not to work with a complex definition but with a more formal one, so as not to exclude information on the wide range of training activities being engaged in.

Thus it is inevitable that the results of the survey of training activities are somewhat ambiguous and, again, rather more indicative than anything else. This general problem of clearly defining and identifying continuing training may be particularly acute in the case of retailing. It is a sector in which the skills required are related to behaviour, products and the image of the firm, all rather specific areas. A large amount of on-the-job training and other related activities are involved.

1.4 Methodology

The methodology was defined by the central team, after seeking the advice of a group of retail trade experts, CEDEFOP, and the Task Force, with a view to achieving the above-mentioned objectives. It required the selection of the case studies and features of the survey[3].

1.5 Selection of case studies

As indicated above, the study focused on the best practices and most significant training projects, to take stock of the current situation, promote new ideas and trans-national partnerships and, to as great an extent as possible, to transfer the best practices to different contexts: to other firms and countries. Research into company training plans and practices therefore made up the core of the study.

This concept raised the problem of sampling and representativeness, and of the transferability of the projects.

The initial target for the survey was set at 50 case studies, out of the total of approximately 3.4 million retailing firms in the Community! This is sufficient to suggest that establishing a representative sample on the basis of statistical methods was simply out of the question.

Having accepted this, selection had to be made on the basis of criteria consistent with the objectives of the study. Considering that one was to promote new ideas, innovative projects would be welcome, but innovation in itself was not considered a decisive criterion. Given the very limited number of cases to be studied, a compromise had to be made between the search for the best practices and the observation of those which would give a more realistic image of the diverse situations in the 12 countries. The whole report is a reflection of this attempt to balance reality against pioneering projects which, hopefully, suggest a trend for the future. Such an approach is hoped to provide more food for thought than a purely idealistic view, based simply on the best practices. Focusing on the average situation would most likely prove to be disappointing and uninspiring.

Application of these principles has led to the use of two somewhat more concrete sets of criteria:

- one refers to the nature of the firm, the type of retail trade it is involved in (supermarkets, department stores, traditional shops, etc.), the type of product (food and non-food) and size. It was hoped that with these criteria a better view of the diversity of the real situation could be obtained;

- the other set of criteria relates to the nature of the project. It refers to the target population, the participation of social partners, the use of innovative training methods and so on. These criteria would serve to identify some of the better practices employed.

Implementing the approach presented two difficulties. First of all, selection on a national level required an adequate knowledge of how training was being conducted in a large number and variety of firms. The participation of employers' organizations and trade unions was requested, but in a large country such organizations are not necessarily able to supply the information required. To assess whether a project meets the criteria or not requires an initial level of research. As a whole, we found the firms to be extremely cooperative.

At all events, the selection of cases had to be considered on a European level. To such ends, a broader sample of over 100 cases was first proposed by the 12 countries. Then, the final selection of 50 cases was made at a European level, with a view to achieving a better balance of the various criteria. For the adjustment process we retained 5 additional cases.

Although the potential for transferability had been considered important, it was not easy to assess "ex-ante," and remains an issue for the discussion of the findings of the "ex-post" report.

[3] See document: "Methodological approach to the sectorial surveys concerning Continuing Vocational Training Plans" Force/91/5/rev.1/final

Table 1 – Distribution of cases to be studied according to main criteria

1. Types of firms	
– Multinationals:	19
of which fifteen are originally from the country responsible for their case study. Two different multinationals were studied in three different countries.	
– Nationals	36
– Cooperatives:	4
– Family businesses:	7
2. Forms of retailing	
– Department stores:	11
– Supermarkets:	18
– Specialised stores: – chains:	13
– independent:	3
Of the 16:	
– in cooperation with associations:	4
– Hypermarkets:	4
– Voluntary associations:	6
(3 belonging to the same multinational)	
3. Size	
– Under 100 employees:	8
– 101 to 500:	11
– 501 to 1,000:	3
– 1,001 to 5,000:	14
– 5,001 to 10,000:	3
– Over 10,000:	16
4. Sub-sector	
– Food:	20
– Non-food:	27
– Both:	8
5. Distribution per country	
Countries A: E, I, P, IRL, GR:	23
Countries B: D, UK, NL, F, B, DK, L:	32

1.6 The context

It was impossible to understand training projects without looking at them in the context of both the firm and country. It is of course important to identify the structure and activities of the firm and, above all, to understand the relationship between the changing strategies and commercial objectives it employs and its training plans and practices. In other words, the emphasis had to be placed on the on-going process rather than a description of the present situation. Indeed, the report shows that very significant developments are taking place in this respect. However, due to the case selection process and the interest in the emerging trends of change observed, that is, the objectives and methodology of the survey, it does not provide a full panoramic view of the sector. Thus we are unable to reliably estimate either the size or speed of change, often observed at a merely embryonic stage. It must also be pointed out that the sector's economic context has changed considerably during the course of the survey. Today, spring 1993, trade is significantly affected by the overall crisis and consumer habits have changed. It is highly likely that in the mid-term this will affect the pace and extent of change of the human resource policy studied, and with the fierce competitiveness of the recession, quality policies may also be strengthened.

Again, with a view to the small number of case studies, and to be able to adopt an approach based on a balanced view of the best practices and overall situation, it was important to place them in the national context. This was shown to be very much the case since the studies confirmed it was hard to consider training issues without allowing for other aspects of human resource management and, more generally, the activities and organization of the sector. The first part of each report is therefore made up of an introduction to the retailing sector, dealing with the structure of the sector, the social and institutional context, the situation of employment, the educational and training system and the identification of the trends taking place. This presentation is based on existing material and on quantitative and qualitative data collected and developed for the study. Beyond its use as background information to the case studies, the material gathered in this way will hopefully prove valuable for documentation purposes and serve as a source of basic information for social dialogue.

1.7 Performance of the survey

The presentation of the sector and the research with the commercial firms were conducted by 13 national research teams (two for Belgium). Research was based on the guidelines provided by the central team and on the proposed items of discussion for the open interviews with the firm's representatives and training managers. In accordance with the philosophy of the study, and in order to obtain a more objective picture of the real situation, it was stressed that worker representatives and trade unions should also be contacted.

Here, as things stand, conditions differ greatly between countries and companies. In some instances companies were reluctant to accept parallel interviews with representatives of their own personnel. When they did, detailed information and precise views on training programmes were not always supplied. Such could be the case of the interviews with the national trade union representatives, who can be somewhat remote from current developments in the field. Under such conditions, some of the descriptions of case studies are essentially a reflection of a manager's own views. At all events, an objective and thorough assessment of training projects would have required much more time and resources than those available to this project.

In this particular area of retail sector training, the inadequacy of information was felt both on a national level and in terms of the individual firm. On a national level, the situation obviously differs greatly from one country to another, but retailing would seem to be at a disadvantage, at least partly due to the high predominance of small firms. Generally speaking, hard facts on continuing training are in most cases quite

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scarce, possibly due to the above-mentioned difficulties of defining the very notion of training. Filling this gap is precisely the objective of the future Continuing Vocational Training Survey, to be undertaken by Eurostat and Task Force Human Resources, Education, Training and Youth in the framework of the FORCE programme. At the same time, Eurostat and DG XXIII are engaged in a large-scale effort to bring together data concerning the retail sector.

Attempts to supplement national data with information collected at company level were sometimes disappointing. This is most probably explained by the fact that training is only a recent priority and that in most countries[4], companies do not feel the need to account for their training efforts. This may be particularly true in retailing, given the importance of on-the-job and informal training. This observation may be related to the current debate on training as an investment: if it is an investment, should it not be accounted for and should we not pay more attention to its profitability?

1.8 Issues of comparability

This research work forms part of an extensive programme of international studies undertaken on a European level and concerned with policy issues related to the construction of the European Community. At the same time, the last decade has seen a substantial development of academic research based on international comparisons, notably in the area of work, employment, training and their relationships. Although the survey is mainly intended to be used for practical purposes, it cannot entirely ignore all the issues raised by international comparisons. Some of these are of a conceptual nature while others are related to the practical aspects of the investigation.
Whether inspired by the regulation theory, the "societal" approach or a more cultural analysis, most of the recent academic research tends to emphasize the specific character of each national context and the coherence of its various components[5]. This further justifies placing the observations against the background of a sectoral presentation, which considers the institutional and social environment. Given the nature of this study it was, however, not possible to analyze such aspects in detail.

At the same time, this study seems to confirm the findings of earlier work concerning the specificity of economic sectors in terms of production systems and employment practices. One of the underlying themes in this report is therefore the respective weight of country-specific and sector-specific aspects. A basic assumption here is that while technological and economic constraints (competition and its implications on price, quality and services) tend to become uniform at an international level, industrial relations and educational and training systems are country-specific. Labour markets are largely influenced by the local environment while employment practices are, to a great extent, sector-specific. This is not a purely academic issue since it also has important implications on the interpretation of this report and of its potential general value in considering policy issues.

On a practical level, an international study such as this requires a very high level of coordination to ensure that the quantitative and qualitative data and presentation of the reports are, to as great an extent as possible, consistent, thus providing an appropriate level of comparability. Rather than imposing a rigid structure, going beyond the above-mentioned guidelines, this study attempts to promote a common approach among participants.

[4] With the notable exception of France, where expenditure on continuing training is a legal obligation, so that some kind of accounting is a necessity, at least for reporting to the administration.

[5] International integration and labour market organisation, edited by A. Castro, Ph. Méhaut and J. Rubery, Academic Press Ltd., London, 1992.

2. NATIONAL CONTEXTS IN THE EC COUNTRIES

2.1 National contexts and evolution

A few simple figures give an idea of the relative weight of retailing in the European economy:

- 26% of the total number of entreprises (3,3 million);
- 10% of all employment (more than 13 million);
- 13% of the value added (including wholesale trade in this case).

These figures are significant enough in themselves to justify a growing interest in the commercial sector. Such an interest has been expressed by the Community, with regard to the changes taking place within the sector. But there are also Community guidelines concerning training which are particularly relevant to the subject of this report.
Against this background, the following pages give an outlook of the changing structure of the retail trade in Europe and the differences between countries. The section focuses on employment, skill and labour aspects prior to introducing training issues which are dealt with in more detail in the case studies. It is mainly based on the 12 national reports prepared for the Force sectoral survey. It also draws on publications or work in progress at Eurostat and DG XXIII.

2.1.1 Problems of definition

It was agreed that the survey would cover items 52.1 to 52.6 of the European classification of industries, excluding the retail sale of vehicles and petrol stations. This definition of course excludes hotels, bars and restaurants. It has not always been possible to respect these constraints, due to the different statistical systems employed in the EC countries.
Another problem which is even more difficult to overcome is the definition of the type of store or business. Several countries, such as France, Greece, Luxembourg and the Netherlands, use the same definition for supermarkets (a sales area of between 400 and 2,500 sq.m.) and hypermarkets (over 2,500 sq.m.). The UK has a different definition (at least 465 sq.m. for supermarkets, 2,323–4,647 sq.m. for superstores and over 4,647 sq.m. for hypermarkets). The problem arises when analyzing the structure of the retail trade.

2.1.2 Structure of the retail industry: a historical perspective

The changing structure of the retail trade obviously has very significant implications on employment and training.

2.1.2.1 Four stages of evolution

All European countries have been affected to a varying degree, and in different ways, by the process of modernization which has tended to replace small independent shops with networks of larger modern stores. At the risk of oversimplifying the process, and in order to clarify the issue, the evolution could be defined as four subsequent stages, roughly covering the last century:

- The first stage is identified with the emergence of department stores, which already offered some of the characteristics of the modern retail trade: open display of goods with large windows, large quantities, lower prices. Such stores appeared (in slightly different forms, e.g. "Warenhäuser" in Germany, for a broader range of customers) in all major Western European countries in the second half of the 19th century (Le Bon Marché was established in Paris in 1852 and inspired one of Zola's novels);

- Around the beginning of the 20th century, multiple or chain stores appeared, often associated with the development of cooperatives. In the UK, multiples included a range of trades as early as the 1880's, while the cooperative movement began in the 1860's and enjoyed a second major spurt of growth during the 1890's. In the Netherlands, multiple stores appeared at the end of the 19th century and voluntary chains were first established in 1932. In Germany, wholesale and consumer cooperatives were developed at the turn of the century.

Table 2 –

	1850	1900	1950	1970	1990
Stage 1	Department stores				
Stage 2		Cooperative chain stores			
Stage 3			Self-service supermarkets		
				Hypermarkets	
Stage 4					Diversification specialization segmentation
					New concept of supermarkets
					New dynamics of small firms

2.1.2.2 The retail revolution

• The third and more radical step was inspired by the example of the American project of the 20's and 30's, which may be defined by the following characteristics: emergence of self-service, widely used in large stores, often located outside the city centre, providing parking areas, selling large quantities bought through central purchasing organizations (giving more bargaining power), and thus able to offer much lower prices. The prototype which exemplifies this Revolution is the supermarket, often described as a self-service store with a sales area of between 400 and 2,500 sq m, with at least 70 % of its sales in food and current household goods. A more extreme example is the hypermarket, with a larger sales area, always outside city centres, a large parking area and often a more substantial proportion of non-food items. During the third stage, these large self-service stores become dominant in the food market and emerged in specific segments of the non-food business (furniture, household equipment, do-it-yourself, gardening). Supermarkets appeared in some European countries in the 50's and hypermarkets in the 60's (especially in France). The expansion of large self-service stores in a number of cases was accompanied by the development of shopping centres, grouping small shops of which they were the core or "flagship". These commercial developments are closely linked to the increasing use of new technologies to improve the efficiency of management.

2.1.2.3 Emergence of a fourth stage

Although some countries have not yet reached stage 3, we suggest that a fourth stage – the boundaries of which are less clear cut – is now emerging. It can be identified with the diversification of store types and organizations and greater market segmentation. Diversification may mean different types of retailing: convenience stores or teleshopping (which may be an extension of earlier mail order firms) for instance. It may also mean new forms of organization, with a variety of associative types, the most widespread being franchise[6]. Segmentation may be related to price range, with the development of discounters selling a limited sample of products at very low prices, while other stores re-introduce more service with the sale of high quality products, including food. This fourth stage does not mean the obsolescence of supermarkets, but may lead to a new formula for supermarkets, oriented towards quality and service, thus no longer competing with the more extreme forms of discounting. Finally, it is likely to involve a higher degree of specialization by type of goods: the UK offers examples of "niche selling", with shops specialized in the sale of sweets or ties for instance.

While some of these developments were initiated earlier and were concomitant with the earlier stage, most are typical of a more recent period (the 80's) and are still under way.

2.1.3 Implications of the process of modernization

This type of historical development has several implications which are highly relevant to this study and are therefore worth mentioning at this stage, although they will be further discussed below.

2.1.3.1 Efficiency and productivity

The modernization of the retail trade implies – at least, up to the third stage – greater efficiency and higher productivity. At the same time, the standard of living and levels of consumption rose in all countries, and a change in consumer habits was noted – particularly with the growing proportion of non-food consumption. The combined effect of these factors has been:

A decreasing number of outlets in the food business, where modernization was more advanced. In some countries this has been counterbalanced by the growth of non-food shops.

A trend towards the greater concentration of firms[7] is reported by most countries, but is difficult to quantify, particularly in a comparative way. Available indications are not consistent and it is reported that, for Europe as a whole, the level of concentration is still low (Panorama 91). One measure of concentration is given in table 1 (Annex). It shows that the average number of persons per enterprise is under 3 in the southern countries and Belgium, and over 5 in the Netherlands, Germany and the UK. Another measure may be found in table 2, giving the number of enterprises per 10,000 inhabitants, which varies between 56 (UK) and 174 (Greece). Increased productivity. Table 3 shows that the turnover per person employed ranges from 4,400 Ecus (Portugal) to 15,000 Ecus (Luxembourg).
The beginning of a process of internationalization has also been seen, most particularly in connection with stage 4. Internationalization[8] can take different forms: direct expansion by opening outlets in a foreign country, mergers and acquisition of foreign firms, joint undertakings (purchasing centres), or development of cross-border trade. Here again, it is difficult to measure impact.

2.1.3.2 Negative effects on employment and skills?

The combination of economies of scale, linked with the development of self-service, new information technologies and the rationalization of structures and work processes, inevitably leads

[6] See for instance: Commission of the European Communities, Direction General XXIII, series Studies Commerce and Distribution, no. 18 "Franchising contracts in the European Community", by Luciano Pilotti and Roberto Pozzana. Brussels, 1991.

[7] See report "Die Zeit" (no. 22, 22nd May, 1992) about an unparalleled wave of mergers of enterprises in the German retail sector. The ten biggest companies dominate 63% of the market while in 1978 it was only 30%.

[8] See, for instance, Commission of the European Communities, Direction General XXIII, Series Etudes Commerce et Distribution, no. 15 "Les strategies d'internationalisation des entreprises commerciales", by André Tordjman and José Dionisio. Brussels, June 1991.

to higher productivity. In other words, all things being equal, the quantity of work required for a given level of activity is lower, with the consequent negative effects on employment levels.

The same could be said of the occupational and skill structure of the workforce from a qualitative point of view. As will be seen below, a reduction in the proportion of sales personnel and a polarization of skills is likely to occur in the third stage. It is quite possible that stage four will represent a reversal of these trends, an issue worthy of consideration.

2.1.4 Factors of differentiation between countries

Once again, the historical development described above is an over-simplification. At all events, as the national reports clearly show, the 12 EC countries are currently in quite different situations with respect to this typical pattern. An interesting and important point for discussion is whether these differences are simply the result of different stages of "progress" (and therefore transitory) or whether they reflect specific national and cultural characteristics (which would then have a more permanent character). Such discussion should refer to various factors and to their specific impact on national contexts.

One such factor is *geography*. For instance, the Italian and Greek reports mention the type of landscape and difficulties of communication as playing an important role in maintaining the traditional structure based on small independent shops. Account should also be taken of differences of environment within countries: in Italy, Portugal and Spain particularly, there are wide differences between retail organizations in major cities and rural areas.

2.1.4.1 The role of institutional factors

A more important set of factors relates to the institutional context. From this point of view, a distinction could be made:

- between countries where the state and state regulations play a dominant role (e.g. Greece) and those where contractual agreements have more impact (Northern European countries, but also Italy and Spain in some instances);

- between centralized and decentralized countries.

The most relevant aspect of the institutional context is the legislation passed to protect small traditional retailers. The earliest initiative in this direction was taken in Belgium as early as 1937. In the 70's several countries (Belgium, Denmark, France, Italy, Luxembourg) passed a law aimed more specifically at limiting the expansion of large supermarkets. In most cases, local authorities were given the power to grant a specific agreement, taking into account local conditions. In the UK, this has been incorporated in the planning of land use.

There are instances (e.g. Belgium) where these measures have had a clear impact in slowing down the expansion of large stores. There are others (e.g. France), where the effect has been temporary and more limited.

In several countries (Spain, Denmark, Italy, Greece for instance) there is a definite trend towards deregulation after a tradition of strict regulation. In France and the Netherlands there has also been a recent tendency to deregulate and leave more responsibility to the partners involved (see training below).

Several countries (Denmark, France, Italy) have recently adopted a new attitude in favour of deregulation or of making regulations more flexible.

Germany has no legislation regulating the creation of new stores, but has an act which limits the concentration of firms.

Another type of legislation directly related to the training issue concerns business licensing conditions and owner qualifications (see Netherlands). In Denmark, the limitation refers only to the right to employ trainees or take on apprentices.

Other legislative aspects, referring to consumer and environmental protection, only have indirect implications on the question which concerns us. They are of particular concern in Denmark and Germany for instance. A controversial issue in several countries is the legislation on opening hours, which has further implications on working conditions and will therefore be reviewed below. Other institutional aspects concerning labour conditions and training will be mentioned in the respective chapters.

Of course there is a very specific contextual issue which concerns Germany. The need for the restructuring of the retail sector and for the corresponding training or retraining of personnel in the new Länder.

Economic conditions and the rate of economic development should also be mentioned as important factors in the evolution of the retail trade structure. For instance, the boom enjoyed by Spain in the 60's and the 70's largely explains the speed of modernization.

Cultural factors may affect supply (retailers) and demand (consumers). On the supply side, an example of a tradition of early retirement is given by the Greek report, especially for women. These early retirers then invest their capital in a shop, thus contributing to the maintenance of a large number of traditional stores.

On the demand side, we shall simply mention food habits, which to some extent determine the retail structure (e.g. traditional consumption of fresh bread requires a large number of small bakeries in France).

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2.1.5 Relative situations of the EC countries

Having reviewed these factors, an initial summary of the relative situation of the EC countries would be the following:

There is a first group of countries which has achieved a new balance of the different retail formulae. Small independent shops of the traditional type hold only a very limited share of the market, particularly in the food business. Small shops are often organized and cooperatives are strong, although their position is not what it used to be. Department stores have, in many cases, stood up well to the new competition. Supermarkets tend to be bigger, but their number is more or less stable and we have only seen a limited development of superstores. The latter are faced with competition from the discount stores, which are often quite well developed, and franchise shops. This implies specialization and segmentation, with a variety of business strategies. In some instances (Denmark), efforts have been made to support small shops in rural areas.

This definition applies to Denmark and, to a greater or lesser extent, to the Netherlands, the United Kingdom and the Western Länder of Germany. The Eastern Länder are undergoing a process of transition from a system of State-dominated shops to a structure similar to that of the western part of the country.

France is in a different, rather specific situation. Hypermarkets, some of them with very large stores, and large supermarkets (associated independent stores) play a dominant role in the market, meaning that the distinction between food and non-food business is not as clear as in other countries. Most of these firms have based their strategies on low prices, so that there is less segmentation and differentiation than in the former group. At the same time, despite continuous losses, small traditional shops are still numerous and hold a substantial share of the market, thanks to national consumption habits (bakeries and butcher's shops are still widespread). This traditional sector is, in most cases, unorganized and very few cooperatives remain. Department stores have seen their market share shrink. As a whole, it might be said that a high degree of dualism is characteristic of the French situation, with highly traditional shops finding it hard to compete with very modern firms. Another specific feature of the French situation is the opportunities afforded by the telecommunications system (Minitel), which has made a relatively early inroad into teleshopping.

Belgium would fall somewhere between the two: the boom of hypermarkets has faded and supermarkets have a limited role, while independent retailers retain a substantial share of the market.

Then come two countries in an intermediate situation. In Spain, the traditional sector is still largely predominant, but the process of modernization is moving at a fast rate with super and hypermarkets now claiming some 40 % of the total food market. It appears not to be meeting any serious obstacles. Supermarkets, shopping centres and hypermarkets seem to be quite successful. Some of the latter are subsidiaries of French firms. The degree of internationalization of modern trade is more advanced than elsewhere.

The Italian context looks quite different. Despite the rapid progress of supermarkets, the share of large firms in the food business is more limited. What is more surprising, and rather unique, is that according to some estimates, between 1981 and 1988 their market share fell, while the voluntary chains and purchasing groups increased their hold and cooperatives also maintained a substantial share. This has meant that instead of small shops simply closing down, there has been a specific process of adjustment and modernization. According to the report, "the fragmentation of retail trade can no longer be considered as a sign of backwardness: for the last 20 years a gradual stabilization has taken place in the relationship between small-scale and large-scale distribution. This being said, there is a substantial difference between the north and the south of the country, where large self-service stores are practically unknown. In view of the power left in the hands of the local authorities and the variety of local situations, there are instances in which cooperatives or other types of associations have been more successful than large firms in opening modern stores. There are also examples of cooperation between traditional shops and modern firms, something which is none too usual but may be found in Italy. This suggests the existence of an "Italian approach", characterized by a high level of adaptability and flexibility".

Finally we have a group of countries (Greece and Portugal, although the latter might be following the Spanish example), in which the traditional form of retail trade is still largely predominant and the impact of large, modern stores is still very limited.

Problems of comparability and the dearth of quantitative data make it difficult to confirm this rather qualitative analysis with such indicators as market share.

A somewhat different typology has been suggested in the communication issued by the Commission entitled "Towards a single market in distribution"[9]. It makes a distinction between:

- Those countries which have achieved a high degree of concentration of firms (France, Germany, UK);

[9] Commission of the European Communities, "Vers un marché unique de la distribution. Le commerce intérieur dans la Communauté; le secteur commercial et l'achèvement du marché intérieur. Commission Communication, COM (91). 41 Final, Brussels, 11 March, 1991.

- Those where concentration and organization would have occurred further upstream and where the market share of smaller firms would remain relatively high (Denmark, Benelux, Industrial regions of Italy), and;

- The other countries, where large-scale retailing has been developed only recently.

It is clear that further research should not be limited to the mere identification of the differences between countries, but should focus on the development of the retail trade in a *regional context*. It is assumed that significant differences between large cities, metropolitan areas and the more rural regions will be found, especially with regard to the top segment of the retail trade. It is no mere coincidence that the majority of the case studies come from metropolitan areas or even the capitals of the respective countries.

2.1.6 Trends and prospects

In all countries, there are four major factors which have, in the past, had an impact on the evolution of retail trade, or are likely to do so in the future. They are:

- the demographic and socio-cultural environment;
- economic conditions, especially in relation to the implementation of the single market;
- technology;
- the organization of work.

2.1.6.1 Four factors of change

a. The demographic and socio-cultural environment has implications on consumption patterns and consumer habits. Higher standards and modern civilization imply a greater demand for a variety of goods and services by increasingly exigent customers. The increase of female employment limits the time available for shopping and creates a demand for ready-made food. A higher proportion of "single" people is moving in the same direction. Aging citizens, whose relative weight is becoming more important, need a different range of goods and services and a more personalized approach. A change in the shopping behaviour of customers, who attach a higher value to their greater leisure time, is likely. The changing age structure also has implications on the labour supply, which will be reviewed below.

b. Economic conditions and the emergence of the single market are probably the most important factors of change. There is likely to be increased competition, linked to the growing impact of internationalization and the emergence of the single market.

In this context, it seems likely that all EC countries will progressively shift towards what has been defined above as stage 4 of the evolution of the retail structure. This would mean a diversity of types of commerce, with an important role for large self-service stores, co-existing with a more traditional, but modernized sector of small independent shops and other types of businesses, such as mail order or teleshopping firms. This might also mean more specialization by product type, more segmentation of the market by customer type and a greater diversity of strategies. It is likely that there will be a sharper contrast between discount firms on the one hand, and firms using the new sales concepts, based on quality and service on the other. Since the latter would normally require a more motivated, better educated and better trained workforce, these changes would have important implications on the subject matter of the study. Case studies indeed show that changes in sales concepts are considered by management as the most important factor of change. Whatever the strategy, ever increasing competition obviously not only implies constant efforts in cost constraint and thus better management, but also more sophisticated marketing and logistics.

The advance of internationalization differs according to the form of retail trade. Some countries are stronger in specific areas: there is more internationalization of discount and mail order firms in Germany, of hypermarkets in France and of variety stores in Great Britain. There is a variety of internationalization strategies: some based on investment in existing firms, others on exporting their own concept (trying to reconcile the need for adjustment to local customers and for economies of scale), while others base internationalization on cooperative agreements between firms in different countries[10]. These strategies have to consider the fact that retailing has to meet local needs and to take national culture based customer habits into account.

As a whole however, it is anticipated that internationalization will intensify in the coming years, not only amongst the European countries, but also with the USA. This should contribute to the acceleration of the process of modernization, especially in the southern European countries[11]. A potential for the further internationalization of mail order and distance retailing has been specifically identified by the communication issued by the Commission.

Several studies have already dealt with the more specific impact of the single market. There is only room for a few of them to be briefly mentioned here. The communication issued by the Commission[12] underlines the role of the commercial sector in the process of the internationalization of the European economy, stemming from the completion of the internal market. But it observes that "European commerce is still strongly partitioned on national lines... To some extent,

10. Commission of the European Communities. D.G. XXIII. "Internationalization strategies of retail trade firms".
11. Commission of the European Communities. Op. cit.
12. Commission of the European Communities. "Towards a single market in distribution", March 1992, commented on by the Economic and Social Council, December 1991.

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the obstacles to internationalization are the natural consequence of service. But there are other obstacles arising from differences in regulations, in the structure of commerce and in commercial methods which need to be identified and overcome". It then suggests a programme including greater consultation, dialogue, transparency and understanding of commercial activity, and dealing with the legal framework and application of community policies for economic cohesion and development.

The study on the social impact of 1992 states that the impact of the single market will partly depend upon its success in stimulating growth and the distribution of that growth. Also, the reduction in transport and transaction costs will encourage the expansion of retailers beyond existing domestic markets (social impact). Other studies mention the following likely implications of the single market:

- the free movement of workers and a certain degree of harmonization of social policies and consequently labour costs;
- the possible cost of measures for the protection of the environment (but the benefit of structural programmes for certain regions);
- the harmonization of rules and contractual agreements regulating the ways in which particular forms of commerce operate (mail order, franchise);
- the new constraints deriving from further consumer protection.

c. The impact of new technologies[13] is often considered as the main source of change, but it appears more limited. It is felt in a variety of ways:

- transactions with customers are the most obvious aspect. Sales point terminals with electronic cash registers and bar code reading scanners are now widespread[14]. This may improve productivity at the cash-point, but also is a possible source of major improvements in the regulation of the flow of goods, in the ordering process and in marketing, through the large amount of information made available;
- the automation of transactions with other firms, and especially with suppliers is still far less advanced, especially when compared to the USA. The UK is the only exception. In the future, it may affect a range of administrative tasks. It is now possible to have direct communication between supplier and distributor computers, for instance, thus making it unnecessary to send out bills. Suppliers can also automatically be immediately informed of the sales of their products;
- new technologies may also contribute to obtaining better information on customers and may be used for ordering (teleshopping and mail order firms);
- automation of warehouses will never be highly developed due to the variety of products and handling operations, but it does offer a certain potential. The most important development is the computerization of the location, processing and flow of goods.

d. The emphasis which is often put on these rather spectacular technological developments often means we tend to forget that their real impact on competitiveness and efficiency depends entirely on the way the organization adapts to them.

Therefore, organizational changes should not be underrated. The shift to self-service has been a major element in the transformation of commerce. Whether the trend will continue further (e.g. weighing fresh goods by customers, or even automatic scanning and payment at the check-out point, which has been tested in the USA) or whether customers will demand greater service[15] is an open question. The answer is probably related to the diversification of strategies mentioned earlier.

Other open questions refer to the organization of work. For instance, there is traditionally a clear distinction between sales, stockroom and check-out point jobs within each department. At the same time, a basic characteristic of the retail business derives from the wide fluctuations in the number of customers in different months, days and at different times. In other words, retail firms have been among the first to look for ways of achieving greater flexibility (something currently rather general in different industries). The main response has been to extend the number of employees working for limited periods or on a part-time basis, in accordance with business fluctuations. But, as will be seen below, there are also limitations to this approach. Consequently, experiments have been carried out with alternative organizational structures, based on greater worker flexibility (e.g. stockroom clerks could work at the check-out point at peak times).

Finally, the efficiency of technological change is subject to appropriate adjustments being made in the organization and precision of daily management, together with a proper understanding of information circuits. These issues have been mentioned by only a few national reports. They do, however, have important implications for

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[13] Lemoine Ph. "Le commerce dans la société informatisée, in "Deux regards sur des nouvelles frontières pour les entreprises du commerce dans le monde". I.C.C. Paris, 1992.
Commission of the European Communities, DG XXIII, Series Etudes Commerce et Distribution, n° 17, "The impact of new technologies and new payment systems on commercial distribution in the European Community, by Steven Burt and Jon A. Dawson, Brussels, June 1991.

[14] In 1990, it was estimated that 4 684 stores equipped in France, compared with 3 999 in UK, 3 600 in Italy, 3 434 in Germany, 1 633 in Spain, 1 061 in Denmark, 863 in Belgium, 575 in the Netherlands and 220 in Portugal (Le Commerce, 1992).

[15] Changes of customer attitudes and demands was also one key question during the Sixth World Conference on Research in the Distributive Trades, held in The Hague, Netherlands, July 4 and 5, 1991 (see Conference Papers).

employment, skills and training requirements and further reference will be made to them in the closing chapter.

2.2 Employment, skills and the workforce

There are four aspects to be considered here: the number of people employed, the employment structure (status, occupations), the conditions of employment and the characteristics of the workforce.

2.2.1 Employment level

2.2.1.1 Slow growth of employment

The level of employment is determined by a combination of several factors:

a. the level of activity, which itself depends on the size of the population (growing at different rates in the EC countries) and on the level of consumption per capita, related to development and the variations in the economic situation;

b. productivity, which depends on the structure and organization of the retail trade, obviously higher in large self-service stores than in small independent shops. Modernization therefore entails comparatively higher productivity and lower employment levels;

c. the importance of part-time work at a given level of activity, the total number of employees will be higher if part-timers are engaged.

These considerations should be born in mind for the interpretation of employment statistics and for the analysis of trends and inter-country comparisons. In addition, the latter are further complicated by the differences in the definition of the boundaries of the sector. In this context, particular care is required when estimating the share of the retail trade in overall employment. According to the latest Eurostat data, it is the following:

Table 3 – Share of retail trade in total employment

Belgium	7-4%
Denmark	7-5%
Germany	8-3%
Greece	9-5%
Spain	11-7%
France	9-4%
Ireland	11-7%
Italy	10-3%
Luxembourg	9-9%
Netherlands	10-9%
Portugal	7-7%
United Kingdom	12-9%
EUR 12	10-0%

Source: EUROSTAT

Trends in a given country are probably more reliable. The data provided by the reports lead us to make the following comments :

- In the 80's there was a slow overall growth in employment in most EC countries. Growth seems to have been more substantial in those countries in which the process of modernization was less advanced. This suggests that increased productivity was limited to a relatively small part of the sector as a whole, and consequently its effects have yet to be felt in full;

- in those countries on which data are available, it is clear that the recession of the early 80's had a negative impact so strong that a decrease was actually recorded in several countries. But the recovery of the late 80's had the opposite effect and there were several instances of substantial growth, even in countries where modernization was more advanced;

- as will be seen below, most countries have seen a continuous development of part-time work, which has been a source of job creation more or less counterbalancing productivity gains. In France and Germany it is estimated that the volume of work (or the number of man years) has remained unchanged during the last decade. In the Netherlands, volume has been constantly decreasing since 1960.

2.2.1.2 But divergent evolution

In most of the countries on which data are available, there has been a decrease of employment in the food sector, where modernization is more advanced and increased productivity more significant.

It is the non-food sector which has benefitted from increased employment thanks to the growth in consumption and the persistence of small shops with low productivity. In the food sector there have been many instances of decreasing employment. France is a specific case which shows gains in the food sector because it includes the hypermarkets, which have seen the highest rates of growth. However, they do in fact sell a substantial proportion of non-food items;

– growth in employment can be observed in large modern firms in all countries. For example, in France employment in supermarkets and hypermarkets more than doubled from 1978 to 1987. These firms can therefore claim to be a source of job creation. But at the same time, employment in small and more traditional firms has been decreasing almost everywhere.

According to national reports in the late 80's, firms with a staff of at least ten (including owners/family members) represented 61% of total retail employment in Denmark and Germany and 46% in France. Firms with less than three employees represented 11% in Germany and only 6% in Denmark (in 1989, compared to 9% in 1980).

If we only consider the wage-earners in the food sector, the figures are much higher, 88% of firms in Belgium and 78% in France employ at least ten people. In Belgium, 40% of wage owners are in firms of at least 1,000 employees.

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2.2.2 Employment structure

2.2.2.1 A decreasing share of independent workers

These trends have obviously had an impact on employment structure, particularly on the distribution of independent (and family) workers on the one hand, and wage-earners on the other. The shift in favour of the latter has reached different proportions in different countries. In Luxembourg for instance, the proportion of independent workers is 18%, 19% in Denmark, 20% in Germany (Western Länder), 21% in the UK, 23% in the Netherlands, 29% in Belgium, 27 – 30% (depending on the sources) in Ireland, 30% in France, 70% in Italy, and 81% in Greece (including family workers). Needless to say, such differences in employment structure have important implications for training.

2.2.2.2 The occupational structure depends on the form of trade

Most countries do not provide satisfactory information on occupational distribution and evolution. This is partly due to the inadequacy of statistical data and partly to the difficulty of classifying retail jobs, which are not always clearly identified. At all events, different classifications or groupings of occupations make it almost impossible to engage in inter-country comparisons. The French notion of a "cadre" has no equivalent elsewhere and the words "executive", "manager", or "supervisor" are interpreted in very different ways by countries which each have their own social structure and classification systems.

Moreover, the distinction between skilled and unskilled workers has hardly any meaning, even within a given country. Finally, the occupational structure depends entirely on the size of the firm and the type of commerce.

The information available suggests that the major difference is not between countries, but between different types of commerce:

- in addition to the owners/family members, traditional retailing solely employs sales personnel;
- department stores offer a wider range of occupations. In addition to sales staff, which still constitute a dominant share, there are a variety of stock-room clerks, clerical, supervisory and managerial personnel;
- supermarkets and hypermarkets have quite different staffing patterns. According to French estimates, they would include approximately 15% managerial and supervisory personnel, only 8% salespersons, 50% stockroom and check-out point clerks, 7% food processing workers and 20% miscellaneous personnel;
- finally, mail order firms essentially employ clerical staff.

These broad indications are sufficient to underline the fact that training needs are highly dependent upon the structure of retailing in a given country.

2.2.3 Employment conditions

2.2.3.1 Different national contexts

Employment conditions also depend on this structure. But, in addition, they are affected by other factors which are more country specific, i.e.: the legal and institutional context, the social context (industrial relations) and the labour market situation (relationship between supply and demand).

a. The relevant legal and institutional context concerns business and working hours, as well as employment contracts.

Legislation on business hours differs from one country to another. Most establish daily limits. Germany has the most restrictive regulations, with normal closing time at 6.30 p.m. and 2 p.m. on Saturdays. Denmark, which also had highly restrictive regulations, is currently debating about a deregulatory policy.

The most controversial issue is the possibility of Sunday opening, normally not legal for firms with employees. But there are exceptions for certain types of business (food), certain areas (tourism) and, in some countries, local authorities may grant special concessions. Employers themselves are often divided on the issue and the impact of Sunday opening on employment and competition is not clear.

The normal working week for employees varies between 37 and 40 hours.

These regulations apply to wage-earners, but independent workers are generally free to open their shops and work for much longer periods. It is indeed one of the ways in which they can withstand the competition from the larger and more modern firms. This is another example of the implications of structural differences.

Another institutional aspect concerns the type of employment contract. In France for instance, the normal contract is of indefinite duration. But, in the 80's, with a view to introducing greater flexibility in the labour market, measures were taken to facilitate short-term employment with contracts of limited duration. In addition, in order to fight youth unemployment, new contracts were designed for a whole range of intermediate situations between employment and training. A similar situation occurs in Spain where contracts for unskilled young workers, lasting up to 3 years, are widespread. In Germany there has been a development of employment below the minimum working week, corresponding to compulsory social contributions.

b. Social context

Industrial relations are clearly affected by national traditions and circumstances so that the de-

gree of social dialogue differs greatly between countries. From this point of view, the retail sector is negatively affected by the role of the small firms, by the large proportion of female and low-skilled workers and by unstable employment conditions, often correlated to a comparatively low rate of affiliation to unions (possibly around 50% in Denmark, 17% in UK, under 10% in France, 3 to 4% in Luxembourg) and social dialogue.

In a few countries (Germany, the Netherlands, Spain and Belgium)) a workers' council must be established in large and medium size companies. It has a say on a number of employment and training issues. However, it is said that in the Netherlands, a number of retail firms do not meet legal requirements.

As will be seen below, training is an area in which interests often converge and greater cooperation can be seen.

In the UK the recent government policy has been one of deregulation, with greater emphasis on the voluntary efforts of employers and a diminution of the role of unions.

The respective chapters of the national reports refer mainly to industrial relations in the sector and to continuing vocational training. Within the framework of the FORCE programme a specific survey has been carried out concerning an important aspect of industrial relations – collective bargaining agreements in the field of continuing training. Therefore, we have limited our survey to some aspects of such a complex issue.

Industrial relations have very specific national features in their history and development, and these features do not only relate to existing legislation but also to the different organization and policies of trade unions and employers' associations. In some European countries, working conditions are negotiated and agreed on by the social partners on a first stage, and agreements are later transformed into a law, as it happens in Belgium. In other countries, like Germany, the influence of the agreements between trade unions and employers on legislation is not so direct. We would like to illustrate the example of Belgium, where the system used was also very important for the development of continuing vocational training with the help of funds and with the participation of trade unions in their management.

In Belgium, at the top of the collective bargaining pyramid are the national interindustry agreements. These agreements establish the general arrangements for all workers in the private sector. These arrangements form the basis for, and are put into practice by, the economy-wide collective agreements concluded in the National Labour Council. Central agreements are later implemented by the several hundred collective agreements concluded annually in the Joint Committees at sectoral level, the principle being that agreements at lower levels are always bound by the provisions of higher-level agreements. These sectoral agreements are presented to the Minister of Employment for ratification, thus making them legally binding for the whole sector.

This is how an agreement was reached on the "mesure 0.25%", which means that companies contribute 0.25% of gross wages to a fund for continuing training. By following a national agreement, the social partners in the retail trade sector signed an agreement on the use of that fund in the sector.

The agreements between unions and employers referring to continuing vocational training have an even longer tradition in France, where the system of funds and their management is the best-developed one in Europe.

However, in more general terms, the introduction of matters relative to continuing training in collective agreements is a relatively recent practice in most European counntries. The explanation for the rising importance of continuing training as an object of industrial relations is obviously to be found in the need for updating the workforce with regard to market competitivity. Thus, it becomes possible for trade unions which are breaking off traditions relative to industrial relations – such as in Greece, Italy, Spain and also Portugal –, to reach agreements which seem to be "a competitivity pact". One of the effects is that the measures taken to improve the qualifications of the workforce have won more interest and attention with regard to collective groups with difficulties in the labour market. The fast rising importance of continuing training as an object of industrial relations – mainly in the policy of trade unions –, is remarkably obvious in those countries where there is no consolidated system of basic vocational training. Let us consider the case of Portugal, where just recently vocational training, both at school and beyond has begun to be faced with its real importance in order to promote the economic and social development. In the last years a greater autonomous regulation of the social partners for vocational training could be noticed. The Portuguese EC adhesion and the revaluation of the role of private initiative and of social groups were the decisive factors to determine those changes.

Therefore, at a macro-social level and in connection with the Permanent Council of Social Agreements, in 1991, a very important agreement was negotiated among all unions and employers' confederations and the state. This first specific agreement on vocational training led to two legal acts which give an important role to social partners in the coordination and management of the certification system through tripartite structures and in the whole coordination of vocational training according to the Permanent Council of Social Arrangements and on the sectoral and regional level. Besides, both acts recognize the unions', the employers' and the entrepreneurs' associations as training authorities. But, in spite of the prospects offered through national agreements, the development of the real involvement of social partners de-

pends a lot on the specific situation of the different sectors of economy. At the heart of everything that has been said in this report concerning the features of the retail trade sector, it is not surprising to find out that, in the case of Portugal, the agreements reached do not cover large parts of the sector. The same situation of underdevelopment in contrast with other sectors is to be found in other European countries, like Ireland. All these comments confirm one of the definite findings of our research, mainly through the analysis of the case studies: the very recent changes in the appraisal of human resources in the retail trade sector.

c. Employment conditions are affected by the overall demographic and economic context. In Germany for instance, downward demographic trends are already mentioned as a source of a potential shortage of apprentices and young recruits for the retail sector.

Lasting high levels of unemployment and alternative employment prospects affect the willingness of the work force to take up jobs in the sector, as do the particular employment conditions, reviewed below. Of course, everything depends on the overall economic situation, which varies over time, not only between countries, but also between labour markets within a given country.

2.2.3.2 Progress of part-time employment and short-term contracts

With the pressure of competition and the dominant attitude to consider part-time work as a necessary condition for flexibility, it is not surprising that part-time labour levels have been growing in most EC countries. However, this is also related to the supply of labour available for part-time work, which itself depends on national conditions (especially the rate of the activity of women).

The data in the annex suggests that part-time work is more widespread in countries where the modernization process is most advanced[16], but also that there seems to be a peak beyond which part-time work stabilizes or even decreases (Denmark, UK; the same can be seen in the USA). In Spain, the amount of part-time work is slowly increasing, but it is not yet widespread and is common only among large hypermarkets.

All country reports state that retail trade is one of the sectors in which part-time employment is most common. It is considered as the test-case "par excellence" for flexibility, with an estimate of only 44% of employees on fixed daily working hours (Belgium). In the Netherlands it is underlined that the duration of part-time work is tending to decrease. The proportion of part-timers working less than 20 hours rose from 15% in 1980 to 27% in 1985. Part-time work employs mainly women (95% of part-timers in Germany while in Belgium 57% of female wage-earners are part-timers vs. 13% men). However, the reports do not discuss the issue of whether this corresponds to a demand by women, a hypothesis considered somewhat doubtful given that peak business hours are not likely to be particularly convenient for women with traditional family responsibilities.

The same question could be raised concerning temporary employment. It is likely that jobs available for specific periods (evenings, vacations, Christmas) may coincide with the student's wish to work part-time. But several country reports (France, Germany, Spain) refer to a more general expansion of short-term contracts, sometimes with less or no social protection. In France it was estimated that 12% of super and hypermarket employees were on short-term contracts. There is little information from other countries, and even less on workers employed on an ad hoc basis or by outside firms (suppliers) for specific tasks. A trend towards the externalization of certain tasks is also mentioned by some reports.

2.2.4 Characteristics of the workforce

2.2.4.1 A high proportion of women

If, as a whole, the proportion of women employed in retail is higher than the average, table No.5 in the annex indicates wide variations between countries. These variations seem to only partly reflect the overall social context (different participation rates of women) and partly the structure of retailing. In most countries, this proportion has increased only slightly while in others it is now stable (Netherlands, UK), or even decreasing (Denmark).

In the countries for which data is available, there is a clear indication that the proportion of females is even higher in sales and clerical jobs, but is far lower in management positions (11% vs. 69% in the Netherlands). Counter-trends do exist but are not very strong, with the notable exception of Denmark, where the proportion of female heads of department is rated at 50%. This imbalance is also related to the predominant position of women in part-time jobs and can be explained in different ways: mobility affected by husband's higher-paid job, prejudice on the part of men, and women's expectations linked with their socialization, traditional roles and family responsibilities.

In France and Germany the proportion of ethnic minorities employed in retail is below the average for the population (4.6% compared with 6% in France and 3.4% in Germany compared with 7.6%). In the United Kingdom research into the employment practices of large employers found that the numbers of ethnic minority employees were well below their numbers in the local workforce. We found some information in Luxembourg, where the proportion of frontier workers may be as high as 50%, as well as in Denmark and Greece

[16] Which is confirmed by French data showing an increase of part-time work in hypermarkets and supermarkets, but stability in more traditional forms of retail.

(with an important inmigration from the East Countries), but not much information available for other countries. In the light of evidence from elsewhere, it would be unwise to assume that no discrimination exists in these other countries. The shortage of information may reflect a lack of awareness of the position of foreign workers.

2.2.4.2 A young, mobile population

Many young people have traditionally worked in the retail industry, according to the reports from Belgium, France, the Netherlands and the UK. This would seem to be the dominant pattern, although statistical information on a number of countries is lacking (the Danish report states that many of the young people who work on a casual basis are not included in the statistics). However, the German report does not confirm that the majority of the staff is constituted by young employees, since it refers to many women in sales occupations who start working again after maternity leave (also mentioned in the British report).

In Greece, it is reported that three quarters of the staff employed in commerce is over 30, which may be partly related to the number of people retiring early and investing in a small shop.

The youthfulness of the staff in many countries may be correlated with a high rate of mobility. In France for instance, retail is characteristic of sectors receiving large numbers of low-skilled young people (often for lack of better opportunities), who do not stay for long. High labour turnover rates are also mentioned in Luxembourg, the Netherlands, and Spain. In Ireland, according to the trade unions, the high employee turnover until now is the reason why employers are not likely to consider the notion of training employees who might leave in the short-term. But as the new legislation determines minimum wage and working conditions, it is anticipated that staff turnover may decrease.

With the combination of occupational structure (large proportion of low-skilled jobs) and the composition of the work force (female and youth), it is not surprising to observe that wages are lower than the average in the retail trade (see reports from France).

All of these factors, together with the somewhat difficult working conditions (especially working hours on Saturdays), affect the image of the retail sector, which seems to be rather poor in almost all countries. This explains why several reports mention a shortage of people willing to work in the area, or even to be trained for it.

2.2.5 Trends and prospects in employment, skills and training requirements

The combination of the demographic, socio-economic, technological and organizational changes identified above affects the skill structure, work content and training requirements in different ways:

a. the structural shift from small independent shops to large self-service stores, as long as it continues – as part of stage 3 of the process described above – contributes to a polarization of skills, especially in the large self-service stores, with few sales personnel and intermediate occupations and a large number of low-skilled stockroom and check-out point personnel.

b. the move towards stage 4, together with the more widespread use of information technology, may have a different effect. Part of the simple and repetitive tasks (labelling, paperwork, some handling) are automated or have become redundant. Increased competition requires not only more, better qualified specialists in marketing logistics and management, but also more competent and motivated sales staff. Satisfying higher customer demands and selling a good image of the company is becoming an essential part of a policy of quality and service.

Thus, most country reports expect that as a whole, the level of skills and qualifications of the workforce employed in the retail trade will be upgraded. This conclusion however, is not universally accepted and not necessarily true for all circumstances.

The Danish report expects that structural and technological change could make lower job levels more stereotyped and remove the most challenging parts of the job content for middle level jobs. The Belgian report also refers to studies suggesting that the extended use of information technologies in a competitive context may result in an even more Taylorian organization (separating conceptual and executive functions), and greater polarization (with worsened working conditions). But it also refers to the possibility of an upgrading of qualifications, to make employees more market-aware and client-oriented. It also underlines that the changes in progress may have negative implications for working conditions, especially ergonomics.

Information technology is therefore but one of the many aspects of skill formation. It is not the most important or the most difficult, since the majority of users only operate standard applications on equipment which is increasingly user-friendly.

It may be useful to indicate that quite different skills may be required in the retail trade, with varying priorities, depending on the type of trade, the category of personnel, and the strategies of the company:

- management skills (not specific to the sector, principally finance and personnel);
- specific technical skills: sales techniques, knowledge of product marketing, logistics;
- behaviourial skills, increasingly in demand, particularly concerning customer relations and mostly related to the specific company culture;
- the use of information technologies;

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- a broad understanding of the economic context and basic constraints facing a business type.

Much will in fact depend on the strategies chosen by each individual firm, when using a potential which opens wider opportunities.
The diversity of individual cases is probably, at least, partly linked with the type of retail structure and strategies: discounters are not interested in client-oriented employees in the same way as firms aiming at the upper segment of the market;

c. Several countries (particularly Germany and Denmark) are concerned with the downward demographic trend, which tends to reduce the number of young people entering the workforce, especially those available to work in the retail sector. Germany and Luxembourg are faced with the unusual situation of a shortage of apprentices to fill the vacancies offered by industry.

2.3 Training

2.3.1 Initial training and recruitment practices

2.3.1.1 Differentiated training systems

This is an area which is particularly affected by specific national contexts. In theory, three types of training systems can be clearly distinguished:

- the school model. Training takes place in schools run or controlled by the Ministry of Education, with an emphasis on education and a fair share of general subjects on the curriculum. France, Greece and Portugal seem to be typical of this model;
- the "apprenticeship" system. Here training is essentially practical and takes place in the firm. Emphasis is on practical knowhow rather than education. The United Kingdom could be considered typical of this system;
- the dual system. Used in Denmark, Luxembourg and Germany, part of the training takes place in-company and the other part at a school (normally one day a week in Germany and, for longer periods, blocks, in Denmark). The schools are supposed to cover general subjects and the theoretical aspects of vocational education, while practical training is the responsibility of business firms. After much debate, Germany is tending to shift from a two-year apprenticeship training scheme for shop assistants to a three-year programme for commercial clerks. Denmark has a school-entry mode of training, leading to the same certificate after three years.

This shows that current conditions are more complex than the aforementioned simple typology. Italy, for instance, has State vocational schools running parallel to a more recent regional vocational training system; in the Netherlands, vocational training can be provided by three different routes; in France vocational diplomas can be obtained through apprenticeship as well as at school.

Looking not only at the structure but also the orientation and content of training systems would have increased the complexity of the study. It has been argued that the French and German training systems have common educational goals, not shared by the British and Italian systems[17], focusing on purely vocational objectives.

In most countries there is a second level of technical commercial schools for management or supervisory jobs.

In addition to the regular training facilities provided by the national system, in many countries there are also specific schools and vocational programmes to prepare candidates for employment in the retail sector. In some countries, such as Spain, this has been the main or only source of initial training. These programmes have been established by employment offices, Chambers of Commerce or employer organizations (see the Portuguese and Greek reports). There are also specific training programmes for low-skilled young people, usually based on sandwich courses, alternating between work and training (Belgium, France, Italy, UK).

But a general discussion of training systems has little meaning without an understanding of their impact on the retail sector. Information in this area is not sufficient, but it looks as though the impact of regular national systems is, in most cases, very limited. In view of the particular skill structure (few intermediate occupations) and employment practices in the sector, – generally speaking – comparatively few graduates are recruited from vocational schools and much of the initial training (if any) is provided on-the-job.

2.3.1.2 Low levels of educational qualifications in the workforce

In most of the countries for which data is available, it is reported that the level of education and training in the retail sector is lower than the average. Even in Germany, where a great majority of young people go through one of the two apprenticeship systems, the profession of shop assistant is practised, to a certain extent, without any special qualification or not directly related qualifications. According to a survey carried out in 1985, 25% of all employees worked without any training and a further 20% received unrelated training[18]. But a significant effort is being made to increase the number of employees trained in areas related to the retail trade.

[17] M. Campinos Dubernet, J.M. Grando: "Formation Professionnelle ouvrière: trois modèles européens". Formation emploi, n° 22. Paris, June 1988.

[18] Quoted according to BIBB: "Die zweijahrige Ausbildung im Einzelhandel. Entscheidungshilfen des Bundesinstitutes für Berufsbildung zur Dauer der Berufsausbildung im Einzelhandel." Berlin 1988.

In 1985 in the Netherlands, 53% of the working population in retailing did not have a professional qualification. A similar situation was reported in Denmark. In France, according to the 1982 census, only 23% of the workforce in the retail sector had a vocational diploma and only 14% had completed high school or received higher education. Although the level of educational attainment has risen since, it remains much lower than the average, which also seems to be true in other countries.

2.3.1.3 Educational qualifications are traditionally required only for management and supervisors

The information available on recruitment practices in a few of the countries is also likely to be valid for others: "a specific training geared to retailing was by no means used as a selection criterion for all jobs. It was a criterion for just over one-third of the jobs. Other personal characteristics were used as selection criteria far more often" (Neth); (employers) "don't seem to attach much importance to the specific training that they have received when they recruit clerical and sales personnel" (F) ; "It is understood from discussions with retailers' and employers' representatives that even if there was a recognized training certificate, an employer would prefer to take on recruits without any previous training and train them in his or her customary mode of retailing." (IRL).

The situation is different however for supervisory and managerial positions. In Denmark there is a tendency to employ people with at least 3 years of vocational education or more; in the UK, trainee managers are recruited from people with school leaving certificates at 18 and/or graduates; in Germany, in contrast to the situation in other sectors, the retail trade still mainly recruits its executives (at least half of them) from amongst the ranks of its own sales staff; in France, where internal promotion was a tradition, super and hypermarkets firms have recently attempted to recruit young people with a certain level of higher or post-secondary education, a policy which was not easy to implement.

With respect to this, an issue which is mentioned by several reports concerns the limitation of the opportunities for promotion. It applies particularly to small firms. In large modern companies there is a greater variety of jobs, but they are limited in number and there are few intermediate jobs.

As a whole, it would seem that beyond the specificity of national training systems, there is a rather common approach to educational qualifications in the retail sector. Even in countries where vocational education and training is widespread, and where the level of qualifications of the workforce is higher, a substantial proportion of retail personnel has hardly received any initial training, mainly in food.

The argument for a sector-specific approach could be further strengthened if we look at the sub-sector or form of retail in greater detail. Recruitment and personnel management practices are closely related to the particular type of work organization and skill structure. Thus, in super/hypermarkets the polarization of skills and the search for flexibility imply that check-out point and stockroom personnel often have no particular qualifications whereas specific qualifications are generally required for supervisory and management staff. In other forms of commerce, a large part of the sales staff will most likely have undergone some form of apprenticeship.

2.3.2 Continuing training

There are many differences between the "systems of continuing vocational training" in the EC member countries. If we understand a "system" to mean a minimum level of institutionalization, which only exists in a rather rudimentary way in certain EC countries. In order to characterize a "system" of continuing vocational training the following aspects should always be taken into account: 1. its relationship to a system of basic or initial vocational training, 2. the role of state regulations, 3. the role of the social partners and, last but not least, 4. finance.

In *Portugal*, recent changes in the general education system include the introduction of initial vocational education and commercial issues. After nine years of compulsory school education, complementary further education is provided with three main alternatives:

Higher education, professional or technical education (with three year courses) and lastly, a professional option of one year, supplemented by half a year of practical training, covering commercial subjects. In 1989, with the Fundamental Law on the educational system, occupational schools were created as an alternative to the previous school options for the 9th school year. Of the 121 professional schools which existed in Portugal in 1990, nineteen schools were specifically for the trade sector. The courses last three years. Besides this, since 1985, apprenticeships have been provided with a legal framework. All this means that Portugal finds itself starting to construct an initial vocational training system for, amongst others, the retail trade. Joining the EC in 1986 was fundamental to injecting new dynamism into the vocational training schemes for the retail sector. It was the larger firms that particularly developed their own training structures. And, furthermore, the National Employment Administration (IEFP – Instituto de Emprego e Formacao Profissional) reached an agreement with the retail employers organization CCP, on the one hand, and with the trade union UGT on the other, for the creation of two retail training centres: CEGOA and CITEFORMA. Thus, in the Portuguese continuing vocational training system the social partners act with their training bodies as providers of training. As far as the financing of the continuing vocational training activities is concerned, the EC funds play a leading role.

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EC funding is also essential in *Greece*. Within the general educational system there is no specific retailing course, and only certain aspects are taught in higher education. A characteristic feature of the Greek continuing vocational training "system" is the large number of training enterprises, consultancy services, associations and governmental bodies providing initial and continuing vocational training courses, none of which offer any degree of transparency. We have been led to understand that the system of finance for vocational training is shortly to be changed in Greece.

Collective agreements between the national employers organization and the General Trade Union have established a certain percentage of salaries which is to be dedicated to training. These funds are to be distributed by the National Employment Institute. However, for now this seems to be blocked as the demand of the employers organization and trade union for a participative board to be established in the National Employment Institute has yet to be met.

In *Spain*, vocational education, as a part of the general education system run by the state, is undergoing profound reform on the basis of the 1990 "Ley de Ordenación General del sistema Educativo"(LOGSE) law. Vocational education will be organized in "professional modules", part of which will involve practical training in firms. In some places there are already pilot modules on commercial distribution under way. This will open the way to vocational education for the retail trade within the public education system. Continuing vocational training is being supplied by the Chambers of Commerce, universities, some town councils and there is an increasing level of in-house-training, mostly coming from the larger enterprises. To date, continuing vocational training in Spain is none too systematic. Part of the financing comes from state/EC funding while the projects in the large enterprises are mostly self-funded. However, this panorama will change in the future, after the General Agreement on Vocational Training is signed by the government and social partners. This agreement provides for the real use of 0.8 % of the total wage package for the training activities carried out by or for the enterprises. Of this, one sixth (0.1% of the total wage package) will be made available to both the employers organization and trade unions, to fund their own continuing vocational training schemes.

In *Italy*, compulsory school education is over eight years. Senior secondary schooling lasts five years and there are three different routes available, one of which via vocational schools. Reform of the educational system is also foreseen in Italy. It would extend compulsory schooling to ten years and replace the present divisions of senior secondary school education with a common two year course followed by specialization. In terms of the higher levels of the public education system, the system provides commercial schools. External training activities are regulated by a 1978 Law which makes the regional authorities responsible for vocational training and each region has consequently adopted its own regulations and organized specific training programmes.

For their training activities, the twenty-one Italian regions make use of training centres, either run by the regions themselves or, on the basis of special agreements, by other bodies such as employee or self-employed workers' organizations other social and educational associations, firms or the cooperative movements. Of all the courses offered in the regions between 1989 and 1991, only 3,7% were on "Commercial Distribution". According to our information, there are no specific regulations on in-house-training, nor are there any general formulae for subsidies.

The *Flemish community in Belgium* has recently (1990) reorganized its secondary educational system to include vocational education. Although as such there is no proper vocational education for retailing in this new scheme, it does cover aspects of the retail trade. For example, office work, sales & showroom, clothing-retail and shop management (all of which are options for specialization). 'Practical training periods" constitute an increasingly significant component of the curriculum in numerous sections within the technical and vocational secondary educational system. Beside the public vocational education available in Belgium, there are also apprenticeship schemes in place in the retail sector. Continuing vocational training for the staff of a company is normally financed by the enterprise itself, and is not regulated in any way. However, in addition to this, there is a fairly extensive supply of continuing vocational training from – in the Flemish part of the country – the Flemish Office for Employment and Vocational Training. This is financed by the so-called 0.18 % legislation, a quota of the wage package that all enterprises pay so as to be able to provide continuing vocational training for the so-called risk groups. As is usually the case in Belgium, the legislation followed a general collective agreement between the employers organization and trade unions (the percentage is currently set at 0.25 %). The social partners tend to prevail when defining the type of continuous vocational training that truly meets the criteria established. But, on a regional level (the different communities), decision-making can come from an agreement between the social partners on a sectoral level. This leaves room for the "risk group" criterion to be interpreted in such a way as to allow courses to be organized for employed staff.

As we see, there is a growing number of EC member states that are structuring their "continuing vocational training systems" via funds from wage quotas. This is a cost which is paid by all enterprises and the social partners are active in the administration of such funds. This structure was originally pioneered by *France*. The 16 July 1971 Act, the keystone of the continuing vocational training system, followed the preliminary

conclusions of a collective agreement between unions and employers.

The link between legislation and sectoral collective agreements responded to a will to generate incentives, thus ensuring that the general standards and behaviour of the partners resembled each other. Thus, every firm with more than ten salaried employees is required to allot a fraction of its wage bill to training expenditure. From the initial 0.8 percent, this legal requirement has been progressively increased to the current rate of 1.4 percent, which has been in effect since 1992. However, what is legally binding is the expenditure, not the training. A firm can meet its legal obligation by paying its funds directly to the Public Revenue Officer. The legal obligation has generated a vast and ever expanding market for continuing training. The French educational system is essentially school-based and traditionally paves the way to university entrance. Nonetheless, a new element was recently added to the existing components of secondary education. It is called the "Baccalaureate Professionnel" and it represents a major innovation. Within its two-year curriculum it requires four months of practical experience in a firm. One of the new "Bacs professionnels" is in Commerce and services. As far as continuing vocational training is concerned, in addition to the training provided by the firms and private training enterprises, the Chambers of Commerce are also of importance since they supply a great deal of training to independent workers/owners of small stores.

In *Ireland*, there is no general regulation of the funding of vocational training as in France but there are sector-specific solutions. The government has developed structures, particularly within many sectors of the manufacturing industry, which allow for the involvement of the social partners in the development and formulation of national vocational training policies. In the manufacturing and tourism sectors for example, statutory training organizations composed of representatives of the social partners exist to take decisions on issues relating to education and training matters in these sectors. In such sectors a training levy is collected from employers, calculated as a percentage of wage and salary costs, and is used to fund training programmes for the sector. However, in the retail sector there has been no government impetus to involve the social partners in the provision of training for the sector. There has been no sector-specific statutory body for the retail sector until now. To date, there is no initial training system for the Irish retail sector. But it seems that the training schemes and organization will change in the near future. In 1991 the Irish Government committed itself to a Programme for Economic and Social progress to build an apprenticeship system which would be based on standards rather than on time reserved. It is foreseen that the retail sector will be included. Finance will come from the contributions to an apprenticeship fund made by all firms. The contribution will be a percentage of the total wage bill.

The outstanding characteristic of the new training system in the *United Kingdom* is its orientation to final professional standards or certificates. In 1988 this new form of work-based qualification for the retail sector, called the Retail Certificate, became available under the provisions established by the National Council for Vocational Qualifications, an organization founded by the government to provide a coherent framework for vocational qualifications in all sectors. All qualifications demanded in the Certificate are translated into course contents in a modular way, so that achieving the Certificate could be thought of as a cumulative process of training, not only obtained as an initial programme, but also later on, as continuing vocational training in firms or evening classes. The Certificate will be recognized and the training schemes provided will be generalized for the retail sector all over the country. As far as we understand, there are state subsidies available for training if the Retail Certificate system is applied.

As in some other EC countries, vocational training in the Dutch retail sector is undergoing a process of evaluation and change. The "core" of the initial vocational training system in the retail sector in *the Netherlands* is the apprenticeship systems provided by the OVD Foundation, the Retail Training Institute (Opleidingsinstituut voor de Distributie). For retailing there are initial, intermediate and advanced apprenticeship courses available. The initial course (starting at the age of 16) lasts three years. Further courses are aimed at management functions or the running of one's own store. As a result of a major reform programme, the so-called SVM project (Sektorvorming en Verniewing) and the introduction of sector level tripartite consultation committees, this post-compulsory secondary training system (age:16-19) is undergoing rapid changes.

One of the main aims of the SVM project is to create a better fit between training and the labour market. The proposed new structure is directly linked to the four levels of qualification in the sector: level I/II shop assistant and sales staff, level III middle management and level IV managers and shop-owners. With regard to continuing vocational training in the retail sector, in addition to the firms there is a number of organizations which provide training. But there are no specific regulations or funding systems so one can hardly speak of the presence of a "system" of continuing vocational training in the Netherlands.

In *Luxembourg* initial vocational training for commerce is encompassed in secondary technical education, where there is a three year professional course which has three different forms: part-time school combined with practical training in a firm, a mixed-system with full-time school blocks and mixed sections, and a full-time school course. At the end there is an apprenticeship examination leading to the CATP (Le certifcat d'aptitude technique et professionelle"). There is also the pos-

sibility of initial training in firms which can also lead to the CATP.

There is no legal obligation, nor regulation or funding system for continuing vocational training. The training system for the retail sector in *Germany* is highly characterized by the highly developed initial vocational training provided by the "dual system". Under this system young trainees are contracted by the firm as apprentices and, in addition to the practical training obtained in the firms, they receive compulsory vocational education in public vocational schools for 8 – 12 hours per week. The "dual system", as legally defined by the Berufsbildungsgesetz in 1969, has seen the extensive, effective participation of the social partners in all its areas.

For the retail sector there is a formalized continuing vocational training scheme for certain hierarchical positions, which issues certificates which are generally recognized throughout the sector. There are no regulations governing in-house continuing training nor is there any official funding system. The enterprises which perform continuing vocational training are entirely responsible for all decisions and plans and for the financing of all their activities.

Vocational training for the retail sector in *Denmark* is characterized by a strong initial vocational training system, the extremely high level of involvement of the social partners in all matters concerning training and by the substantial financial funding of participation in continuing vocational training courses.

Initial education in the retail sector normally comes via one of two training routes: both involve a mix of apprenticeship training and vocational education: the school entry mode and the firm entry mode.

In the 1991 law on vocational education, the criteria for admittance to vocational education, the general structure of education, including duration, government contributions to the costs of such education, etc. are specified. It also outlines the role of the trade committees and the commercial schools. This law explicitly places the social partners (through the trade committees) in a central role, by specifying the aims rather than the specific content of the education.

Continuing vocational training courses for skilled workers in the retail sector are organized by HE, a council with equal representation from the employers organization and trade union side. The labour market authorities make an important financial contribution to all these continuing vocational activities. Besides its general courses, HE offers "demi-confectioned" courses for firms for which funding is also available and tailor-made courses paid for by the firms. Furthermore many enterprises have their own training schemes, with no assistance from HE.

Continuing vocational training aspects were briefly mentioned in the national reports. In the second part of the survey, the subject is discussed more extensively, showing the characteristics of and tendencies for continuing training in the retail trade in the European Community countries.

CASE STUDIES

PART 2:

3. **CASE STUDIES IN THE EC COUNTRIES**

3.0 Introduction

3.1 Perception of the market situation and sales concepts

3.2 The organization of continuing training

3.3 Vocational training organization in multinational groups

3.4 A very important target group: the owners of small enterprises

3.5 Groups of employees as target groups

3.6 Qualification needs and training plans

3.7 Access to continuing training

3.8 Types of retailing and CVT

3. CASE STUDIES IN THE E.C. COUNTRIES

2.

3.0 Introduction

In the following we present an analysis of the 55 case studies carried out by the national research teams in each of the EC countries. The methodological approach has already been described and discussed in the general introduction to the report.

Here we simply wish to provide an indication of how we are to present our findings. Nearly all of the following chapters deal with specific aspects of continuing vocational training in the retail sector in Europe. This enables us to group together examples concerning the same issue, from each of the EC countries in which such were to be found. Consequently, the specific context in which a solution, or approach has been developed will not be discussed in this context. We realize that the contextual conditions are of great importance and that even similar approaches or solutions may have different social meanings in one country or another.

Later, in the conclusions, we shall attempt to present our findings the other way round. That is, expounding the existence, or lack, of common features in the different forms of retail trade across Europe and, even more importantly, discussing whether common features are apparent in all the cases from a single country. Although within the framework of this study it was not possible to integrate the contextual descriptions and case studies further, chapters on "National Features on Continuing Training" include certain points concerning their interrelationship.

When presenting specific examples from a national report we give the country abbreviation (e.g. DK, UK and so on), thus enabling reference to be made to the first part of this report or to the national reports, available from CEDEFOP in Berlin.

Prior to presenting the results of the analysis of the case studies, we thought it important to re-

Table 1 – Information available on the six topics in the case studies[19]

SIX TOPICS
1st: Existence and nature of training plans
2nd: The approach to skill needs analysis
3rd: Target population of the CVT
4th: Personal needs of participants in training
5th: Expenditure as a percentage of the wage bill
6th: Cost/benefit analysis

Country	1	2	3	4	5	6
Belgium						
B.1[20]	x	x	x	x	x	x
B.2	x	x	x	x	x	x
B.3	x	no	x	x	x	no
B.4	x	no	x	no	x	no
Denmark						
DK.1	x	no	x	x	x	no
DK.2	x	no	x	x	x	no
DK.3	x	no	x	no	x	no
DK.4	x	no	x	no	x	no
France						
F.1	x	x	x	x	x	x
F.2	x	x	x	x	x	x
F.3	x	x	x	x	x	x
F.4	x	x	x	x	x	x
F.5	x	x	x	x	x	x
F.6	x	x	x	x	x	x
Germany						
G.1	x	no	x	x	x	no
G.2	x	no	x	x	no	no
G.3	x	no	no	no	no	no
G.4	x	no	x	no	no	no
G.5	x	no	x	no	x	no
G.6	x	no	x	no	x	no
Greece						
GR.1	x	no	x	no	x	no
GR.2	x	no	x	x	x	no
GR.3	x	no	x	no	x	no
GR.4	x	no	x	no	no	no
Ireland						
IRL.1	x	no	x	no	no	no
IRL.2	x	x	x	no	x	no
IRL.3	x	x	x	x	no	no
IRL.4	x	x	x	no	x	no
Italy						
I.1	x	no	no	no	no	no
I.2	x	no	no	no	no	no
I.3	x	no	no	no	no	no
I.4	x	no	no	no	no	no
I.5	no	x	x	no	no	no
I.6	x	no	x	no	x	no
Luxembourg						
L.1	x	no	x	x	x	no
L.2	x	no	x	x	x	x
Netherlands						
NL.1	x	x	x	x	x	no
NL.2	x	x	x	no	x	no
NL.3	x	x	x	no	x	no
NL.4	x	x	x	no	no	x
Portugal						
P.1	x	no	x	no	x	no
P.2	x	no	x	no	no	no
P.3	x	no	no	x	x	no
P.4	x	no	x	no	x	no
Spain						
S.1	x	no	x	x	x	no
S.2	x	x	x	x	x	no
S.3	x	no	x	x	x	no
S.4	x	no	x	no	x	no
S.5	x	x	x	x	x	x
United Kingdom						
UK.1	x	x	x	no	no	no
UK.2	x	no	x	x	no	no
UK.3	x	no	x	no	no	no
UK.4	x	no	x	no	no	no
UK.5	x	x	x	x	x	x
UK.6	x	x	x	no	x	x

[19] Here we notice only if there is information about the topics in the case-studies. If there is information we marked a "x", if not a "no", without any comment on the quality of information or on the contents itself.

[20] We use a simple code for companies just in the order of numbers for each country. B/1 a.s.o.

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mind the reader of the nature of the survey. It was not intended to present the reader with a complete portrait of the European retail sector, but more to concentrate on the developments made in the area of continuing training. With the case selection process employed (described above, in the first part of the report), the sample basically consisted of companies or company associations which represent a fairly dynamic segment in terms of human resource policy. The empirical information acquired from the companies cannot be generalized to the sector as a whole. It would be more realistic to see them as a minority. However it is a heavyweight minority, with great influence throughout the sector. When reading the analysis of the developments, one could be lead to feel rather optimistic. However, this feeling derives from the limitations of our survey and must not lead us to believe that such is the reality of the average concern in the sector. The research carried out in the companies and associations has not always offered answers to some of the essential topics to be analysed. The following chart provides a formal overview of this practical constraint.

3.1 Perception of the market situation and sales concepts

Within the retail trade sector very distinct concepts coexist and have distinguished its activity throughout its history, particularly over the last century. As a symbol of progress within a clearly urban area, department stores appeared in the last century and after the Second World War, different formulae of self-service were introduced, as described in Part I.

Throughout the process there were retailers who based their activity on the sales staff as the central figure of retailing, as had traditionally been the case. Such firms still exist although, in many cases, they have become more specialized and have less weight in the sector as a whole. The concept of self-service has simultaneously become widespread, not only in the food sector, but also in other product sectors.

What stands out from the case studies is the fact that we are experiencing a post-self-service stage, in the sense that both the advantages of self-service (for the customer and the firm) and personal service (for the customer) are combined, without ignoring the client's expressed wish, for example in the case of fresh products ("100 g. of Manchego cheese, from that bit"), high value products, those requiring additional explanation or, in general, wherever the customer may require individualized service.

This category has lead to repeated debates when drafting the report – with the social partners and researchers from the twelve countries. To further clarify its relative significance, we wish to highlight the following points:

- The first section describes how the introduction of the self-service system has revolutionized the trade. That is, its introduction did not simply affect the salesperson-customer relationship, but the whole of the retail company's economy: the broad range of products, their presentation, the rationalization of the use of space and lastly the computerized goods flow systems. Thus when speaking of the post-self-service stage, we do not refer of a move back to the past but, as has been stated previously, a combination of self and client service, personalized sales – as developed during the self-service era. This must be borne in mind if we are to understand the current processes of the crisis and the modernization of the sector, which have an especially negative effect on the small independent shops that provide personalized client service type sales, without all of the advantages of economies of scale.

- "Post-self-service" establishes an emerging trend, but, as has previously been stated, we are unable to estimate its size or rate of expansion. What we are able to say is that the features of this new sales concept play an important role in our case study cases and feature strongly in the technical publications of the sector. However, a large segment does, without a doubt, still exist, in which the criteria used are pure self-service cut-price concepts. Personalized sales does possibly mean higher costs and in view of the current crisis, it is not certain whether the shops will be able to pass such increased costs (in addition to those rising anyway) on to the consumer. Here, the Financial Times (British edition) states:

"Manufacturers and retailers are unsure how far they dare pass on higher costs at a time of weak demand. The recession has made many customers economize by cutting out luxuries and 'trading down' to less expensive products." (20/21.2.93).

Our sample also showed examples of the two extreme cases mentioned. In all cases, perception of the market situation was the catalyst which caused emphasis to be placed on continuing training, its content and organization, and above all, the reason for accentuating its varying function, differing according to the sales concept or product sold.

On the one hand we have firms with a chain of shops selling very special products, usually requiring some kind of explanation from a qualified shop assistant. We are going to present two examples, one firm selling optical articles (DK1) and the other selling electrical machinery and equipment (IRL3). Both sub-sectors have grown in the past few years and both firms have multiple shops in a large number of towns throughout the country.

Information on how the optical firm DK1 sees its present situation in the market and how its strategy and sales concept are defined follows:

"In 1985 DK1 started an internationalization process by opening its first outlet in Norway. This process will be continued ...

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As DK1 expects the competitive environment to lead to a limited number of international chains dominating the European market in a few years, they strive to be among them ...

Another part of the strategy and a precondition for reaching the goal mentioned above, is a greater influence on production and product development. So that a large part of the assortment is DK1's own brands.

A recent change has taken place concerning the scope of services offered to customers by adding professional aid in the choosing of colours as well as shapes matching the type, personality, clothes, make up, etc. of the customer. For this new service, DK1 started a few years ago an entirely new education as "faciolog". (DK1)

Their conclusion on continuing training is:

> "Education is highly valued. In their striving for superiority in the sub-sector, continuing vocational training is a must." (DK1)

All their employees have a high level of education and training.

The situation is quite similar in the firm selling electrical supplies and appliances, IRL3, although this firm has the advantage of belonging to the state electricity company, which allows customers to have a direct relationship with the electricity supplier in the same shop. But,

> "Competition is intensive within the electrical appliance sector and the sector is dominated by a small number of large companies."

> "IRL3 makes substantial investments in the development of staff so that employees' talents and skills may be used to the best advantage of the person and the company in the interests of better service for the customer."

As a consequence they have recently set up a pilot project with "Learning Centres".

What we find of real importance is the fact that, in these cases, continuing training is basically oriented towards the development of the professional capacity of the sales staff (although such training also exists for managerial staff, mainly for shop managers).

In contrast, we find almost the opposite to be the case for the large classical self-service shops, examples of which are a powerful group of supermarkets (DK2) and a multinational furniture company (DK4).

The sales concept at the supermarket company is:

> "All the store-concepts of DK2 are based on a high degree of self-service, and a high customer traffic. Accordingly, the number of cashiers is high. ... The wish of DK2 to have a strong competitive position has made it natural to look for expansion possibilities outside Denmark...".

DK2 is a very large firm and, in the Danish tradition, it provides a wide variety of continuing training options of all types. However, the core of training is not to provide more knowledge to those people who work in direct contact with the clients (although this certainly happens), but to provide them with a wide range of possibilities for internal promotion by means of training. One of the reasons is that with the firm's expansion, there is a constant demand for managers and executives.

The situation in the furniture multinational is virtually the same, although they have recently tried to increase their customer base:

> "The target group of DK4 is very broad and encompasses the majority of people. A recent upgrading has taken place in form of larger width and depth of the selection of furniture for the sitting room; thereby targeting older consumers with greater purchasing power."

Within this sales concept, staff turnover of cashiers is not seen as a serious problem – very similar in practice to the situation at DK2:

> "The relatively high turnover of staff in the categories of sales assistants and cashiers which is normally seen as a problem, might not be as large a problem as expected. This is due to the special DK4 concept of passing many functions to the customers. In a trade off of low price, i.e., customers do not expect the same kind of service in DK4 as in traditional furniture stores."

The two types presented share the following feature: the present stimulus for a broader offer of continuing training does not derive from a process of change or nuances in the sales concepts, but from quantitative expansion, or from the need to retain competitiveness under the same sales concept.

The most serious problem affecting continuing training appears in the groups of small retailers, be they franchises, independents or cooperatives. With the increasing competitiveness of the market, training needs were particularly evident amongst the business owners themselves. Training was provided by the group of cooperatives (in the case of I5) or in collaboration with an external training institution (in the case of NL3).

Yet the most remarkable thing with most of the cases in our sample, is not the continuity of the concept but the recent or current processes of change. We shall group the case studies together according to the main trends, without excluding the possibility of the existence of a combination of conceptual elements in a single firm, and the role of shop assistants within the different concepts.

Thus, we can distinguish between:

- concept changes towards higher product and service quality,

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- concept changes towards creating a new image,
- concept changes towards new or different groups of customers.

Within the last of these classifications we find the cases from the former German Democratic Republic, all of which have rather special features. However, there undoubtedly are certain comparable aspects. They basically derive from the change from a distribution to a sales concept.

3.1.1 Concept changes towards higher product and service quality.

Here we find cases such as IRL1, IRL2, D1, DK1 and NL1.

IRL1 is a good example of what has to be understood as a policy which attempts to persuade the customer on the basis of the quality of the products and services. IRL1 is one of the most important food chains in the country and specialises in fresh products.

> "The company specializes in the marketing of fresh foods particularly fruit, vegetables, meat, dairy products, bread and prepared food. IRL1 has pioneered the introduction of crèches in its supermarkets as well as in store bakeries and butcher shops. It has developed a range of specialist food departments in every store such as delicatessen, pizza kitchens, pasta kitchens, salad kitchens and even sausage kitchens. ... IRL1 competes on the basis of fresh food and customer service. ... For example, in recent years IRL1 has spent much time and resources in encouraging the sale and consumption of exotic fruits and vegetables even in the stores located in working class areas."

What is most important in this case is that these are not the traditional types of small fruit and vegetable shops found in the Southern European countries, but a chain of supermarkets which has recreated the fruit shop type within this concept of economies of scale. The concentration of all of its activity in the area with the highest purchasing power – the capital city – is another factor. In the concept of supermarket with a high dedication to customer service, the staff/shop ratio is a very significant indicator. IRL1 runs 13 shops, with a sales area of over 30,000 sq. m., and employs more than 2,000 people; the highest staff/shop ratio of all the supermarkets in IRL.

IRL1's emphasis on training is explained thus:

> "The company firmly believes in the importance of training particularly in the achievement of company objectives of being specialists in the marketing of fresh food and providing the highest level of customer service. Underpinning the company's training policy is that staff must understand the need to react to customers in the company way that is serving the customer better than anyone else in the market place. Management believe that the function of training is to ensure that employees are allowed to look after the customer."

Here we find part of the philosophy of this type of post-self-service supermarket; the employees are allowed to look after the customers actively, implying a break with the old idea that it was the customer who was to take the initiative.

Although NL1 is also a chain of supermarkets, it is quite different, above all in its historical development. IRL1 has applied a somewhat sophisticated concept of quality and customer service for some years. NL1 went through long periods of traditional self-service and of competing at lower prices, with an even greater reduction of personal service to the customer, with the mass introduction of discount shops in the market. It is significant to note that this period, in the early eighties, was accompanied by a reduction in the expenditure on training. The success of this move consolidated NL1's leading role in the field of supermarket chains. Over recent years we have seen a controlled distinction of the sales concepts, with regard to the changing attitudes of customers.

> "From 1985: a shift from competitiveness in price to quality. In the mid-eighties, the customer, while continuing to attach importance to price, was seen to pay increasing attention to quality, variety, convenience and service."

NL1 has responded to this trend by:

- Maintaining an extra low price level for a large number of daily necessities.
- Offering, in addition, many groups of products with a clear added value in the form of choice
  of product, quality level and service (...) The range of own brand products encompasses some 1750 items. The price/quality ratio of these products has been optimized.
- Carrying through innovations in store formulas, mainly on the basis of experiments with the New Super Market and in product line (bake-off products, ready-made fresh products, etc.).

But the concepts at IRL1 and NL1, despite the fact that NL1 has moved closer to IRL1's position, are remarkably different. In the case of NL1, although it publishes a magazine providing product information and has recently installed a customer service line, the following must be noted:

> "The store is and remains the place in which customers must be able to turn in the first instance with questions and comments." (NL1)

D1 – the third German department store company – usefully highlights the fact that promoting quality usually implies a renewal or extension of continuing training:

> "The realization of the new enterprise slogan "Good is not good enough for us", which has been adopted by all the multiple shops and for

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all groups of employees by transferring it to training programs, each one with a duration of several hours. In relation to this, a compulsory "introductory strategy" has been developed. The introduction of a new training program for the sales staff: "TIP with method", which contains the idea of a daily department-related discussion with all the employees in sales positions ... Moreover, the training in merchandise knowledge is worked out by the central office together with the manufacturers ...".

IRL2 is a family business with one single department store at the time of the survey and a 50 year old tradition in the heart of Dublin. The recently renewed board of directors has created a new sales concept which combines the concentration of a special group of customers – in this case mainly female customers between 25–44 years old – with a policy of quality products, and a new market segment to conquer, young people of between 16–24. They have embarked upon a ten-year business plan, with five years left to run.

"Major items on the agenda are:
- a move away from a "low" price to a "quality/service" image with customer service identified as the main competitive advantage,
- computerization of stock linked to sales,
- more service departments,
- upgrading staff and management skills ...

A philosophy for the store of the 'best standards in retailing' is being promoted. It is recognized that in many cases progress must be made from a relatively low standard of basic education and training."

We find company I2 in a similar situation, but without such a complex plan for the future. The company operates as a department store selling men's and women's wear and household articles, and even though for part of the business it wishes to maintain the traditional concept, based on customer activity, it also wants to move further and further away from the department store type towards a specialist shop type:

"The group strategy is to seem more and more like a shop and less and less like a department store and this means adopting a whole series of actions for constant improvement of the quality of service to customers."

3.1.2 Concept changes towards new or different groups of customers.

As we have seen above, the last case partially fits into this group. The following examples show that attempting a change to new customers does not necessarily imply more continuing training for shop employees, only when there are also changes in the treatment of customers.

A chain of ready-to-wear garments, D4, moved away from the concept of a specialized department store for all types of customers about five years ago. The firm, heavily immersed in the fierce competition of the ready-to-wear market, aimed at concentrating on a better quality and price range. However, this has had no direct or indirect effect on the development of continuing training. Continuing training is more or less the same as it was before, and its function is seen by the firm as being addressed to questions of internal promotion and improving the sector's image, not for customers but in order to attract younger employees.

NL2 runs a great number of large garment shops which have recently diversified heavily, creating groups of shops for different groups of customers. But the stimulus for continuing training did not come from these conceptual changes. It was provoked by the company's crisis in the mid-eighties, which led to a large-scale communication process, the product of which, "The Prove-it Project" , included training goals.

A remarkable change towards a different group of customers, with implications for training, can be seen in the case of IRL2. It is a department store which in its recent strategy has included the objective of attracting a segment of the market made up of young people aged from 16 to 24. This, together with the emphasis on customer relations, has implied an important change in the training policy, with a very significant growth of investment and an increasing dedication to training on the part of sales staff.

Likewise, L2, located on a border area, stands out as an interesting case. In order to offer services and attract customers from neighbouring countries, L2 has set up a training policy in which:

"The training courses especially insist on a general approach to sales behaviour towards customers coming from the neighbouring regions of Luxembourg, France, Belgium and Germany" (L2)"

3.1.3 Concept changes towards creating a new image.

We shall take E1 as an example. The firm was originally a variety store.

Different circumstances, but mainly competition from the superstores, led to the need for a change to a policy aimed at turning their outlets into shops specializing in household equipment, with the additional advantage of being neighbourhood convenience stores.

"The new corporative image, together with a new image of their shops took place, this being oriented towards attracting a different type of customers (.....). At the same time, they began a policy of consumer service (....) (E1).

A change of image does not in itself have effects on training. But the commercial goals of the company – to attract new customers, and develop consumer service in certain areas – did in fact lead to the setting up of a training programme for cashiers and sales staff, as an im-

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portant part of the new image the firm wanted to create for its outlets.

3.2 The organization of continuing training

The creation of an internal structure for providing continuing training is one of the important indicators of the strategic role which companies bestow on training.

What may be deduced from the analysis of the case studies is that retail trade is undergoing a process of evolution in continuing training. The FORCE sectoral study works as a survey of a process of profound change.

3.2.1 Recent structural changes

Our sample presents certain cases with a long-standing tradition in continuing training, with structures in place prior to 1980, which have not changed significantly up to now.

However, in most cases there have been structural changes since 1985, many very recent, and some still working on a trial basis.

3.2.1.1 Structural changes between 1985 and 1990

- Foundation of a training centre as a non-profit making institution within the human resource department (F5);
- foundation of a regional structural unit of training centres (F6);
- foundation of a training centre (DK4);
- development of an internal training unit – a training department in the multinational company in 1986 (L1); a training department in 1989 (IRL2); a Vocational Training Department in 1989 (P3);
- development of a training department as a central structure in 1987 (L2), – Setting up of a training policy and plan in 1988 (GR4), in 1989 (GR2, GR3, P1);
- "professional development of a training structure" in 1988 (NL2).

3.2.1.2 Changes over the past two years

- Development of a central training unit for a large association of food retailers, and establishment of a commercial school in 1991 (F1);
- creation of an internal training scheme (F4, E1, E2);
- foundation of a food handling and retail sales school in 1990 (B1);
- projects with Learning Centres equipped with all kinds of training materials (IRL3);
- restructuring of the training department focusing on a quality policy or specialization (I1, E5, E4);
- creation of a training service within the Human Resource Department (B4);
- renewal and revitalization of the training system (F2);
- structural changes towards the decentralization of training (NL1,B2).
- Training activities in collaboration with social partners (DK2)

In order to provide a quantitative estimation, some figures have been provided below.

Sample: 50 cases (not including associations or multinational voluntary chains);

Qualitative changes in continuing training between 1989/90 and 1992:	**22**
Of which:	
Profound changes in the organization of continuing training	9
That is:	
creation of a continuing training department	3
creation of a training centre	5
Introduction of innovative programmes of continuing training with effects in organization:	9
Cases with changes in New Länder	2
Profound changes in the organization of continuing training between 1985 and 1990:	**14**
Of which:	
creation of a training department	5
creation of a training centre	4
Continuing training structure existing before 1985 or recognizable recent changes:	**14**

This means that in over 70% of our cases there has been profound structural change, affecting the training structure, in the past 7 years. In almost half the cases this has been a very recent occurrence, taking place over the last two years. The latter are still working on a trial basis. In 12.5% of the cases, there was not even a department in charge of training prior to 1985 – though it must be remembered that our sample undoubtedly represents a positive selection from the sector.

Given that all these changes are very recent, it can be understood why the idea of retailing as a far from dynamic sector in the field of training (continuing training), is still prevalent.

3.2.2 Different ways of organizing continuing training

From our evaluation of the sample we can assume there to be a widespread tendency to internalize training. There are very few instances of companies sending their employees to external training institutions, and it is a sort of privilege offered to them, with the exception of cases such as Denmark, where it is standard practice. Others cannot offer all the types of training and encourage the participation of their staff in courses given outside the firm. In such cases the firms maintain a constant level of collaboration with the external institutions. There are also examples of small businesses making joint use of their own associations or others for carrying out training programmes.

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3.2.2.1 Decentralization of training

We will start with a description of the firms that have a training department in place but which do not have their own training centres.

Thirty-six of the 55 firms in the sample do not have specific facilities available for training their employees, although 12 of the firms with no facilities clearly embrace the concept of decentralized training.

First we shall examine the cases that favour a decentralized training structure.

Three different forms of decentralization can be distinguished:

a. A central training department operating as a service agency for decentralized responsibility units.
b. A central training department complemented by decentralized practices.
c. Decentralization of training, with no central department.

A very interesting example of a group a. company is IRL1, a chain of food retailers specializing in fresh products, and very proud of their rather informal organizational style. Their philosophy is based on the importance of each outlet.

At IRL1, the training department is part of the human policy and training department. Eight out of its fifteen employees are devoted to training. They have facilities for training where the department is located, but the central departments of the organization also offer services. Accepting these services is the responsibility of shop and area managers:

> "The most unusual feature of the company's organizational structure is the distribution of authority and the importance of the area and store managers in the organization. The operations director has three area managers reporting to him; each of the area managers are responsible for four shops ... The store manager reports directly to the area manager. Within the company the area manager has the absolute responsibility and the same point applies to the store manager though to a lesser extent. Area managers have the authority to spend as much as it is needed to provide the level of customer service necessary in the shops for which they have responsibility. ... The function departments in the company such as finance, training and personnel and marketing are support services to the area managers and store managers. The area and store managers are not obliged to use the services offered by the functional departments; the shops are required to buy the services of the functional departments."

NL1, a large chain of supermarkets, has experienced a great number of changes in the organization and location of the training department. But with the increasing importance of training over the past few years, the company is looking towards an organizational type of internal training similar to the case described above, without giving such a radical autonomy to training as a service. The company has made two remarkable changes: first, in 1987, responsibility for the training department was transferred from the Personnel and Organization Board to the Operations Board. In 1990 a process of decentralization took place, with more responsibilities for area managers and effects on training, too. A training coordinator was appointed for each area, exclusively answerable to management. Thus, the function of the central training department has changed considerably:

> "The object of the employee training department – since 1987 – is to offer support in the working strategic change processes by developing, implementing and evaluating the content and form of courses for store employees. For some years now, responsibility for the organization, planning and financing of these courses has, at least for the majority of jobs, fully belonged to the management concerned. The employee training department is in fact a supporting service within the directorate of operations."

Moreover, the objective of all these training efforts is not based on individual interests but on improving the image of the company the customer has.

For example, the multinational ready-to-wear and special food assortment company (F4, IRL4, UK5) fits in to group b), but does not go so far in its decentralization, above all because the firm's head office is making a great effort to standardize the elements of continuing training.

However, the firm delegates much of the responsibility for training to shop managers and supervisors where a training coordinator has been introduced. In each country head office there is a training department. In the case of IRL4, they describe their philosophy as follows:

> "The training department's role is to make sure that no training needs remain unmet because of a shortage of relevant training material or other resources. The principle of individual "responsibility" and ownership of one's own destiny is the key to IRL4 training and development of strategy."

A remarkable functional difference in the concept of the decentralization of the structures responsible for training is immediately apparent when looking at the two cases. In the case of IRL1, the most important goal is to improve the quality of customer service in each shop, placing the responsibility on the managers. IRL4, on the other hand, relies on an internal promotion system whereby the most immediate superior will discuss career prospects and advise employees.

In F4 of the same multinational, the organization of training is almost identical:

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"Most of the training programmes are carried out in the stores by a specialized team. Thus, the central office has only one manager responsible for training, and that person's role is, on the one hand, to serve as intermediary between the French stores and the training department of the home office (translation of teaching tools into French, definition of main lines of training); and on the other, to direct and coordinate the training departments of the different stores. This central department also has direct responsibility for the organization of modular training units for all the stores. ...
In all the stores, even the smallest ones, the head of personnel is assisted by a training supervisor who is not only responsible for implementing the training programme conceived at the home office but also for conceiving other programmes in response to needs expressed by managers and supervisors or the store personnel. Thus, these stores often create their own training materials."

I5, the multinational association of super and hypermarkets, has also undertaken a policy of regional decentralization for training activities, which take place at the regional distribution centres:

"I5's training policy is designed to respond to the complexity of the organization and to respect the specific characteristics of each CEDI (distribution centre). That is why a training coordination unit has been set up at the head office which ascertains the needs of the various centres and locates external consultants or ready-made training packages for the CEDI's. Strictly speaking, there is no post of internal training officer."

Some companies have developed a joint responsibility system for the central training department, mainly responsible for preparing the modules on which all company training is based, and local training coordinators, whose task is to identify training needs, and then plan and implement the corresponding programmes.

The large food company (F3) is an example of a group c. enterprise. Its training units are part of the company's regional structure.

"This training unit employs around 5 people and is placed under the authority of the manager of human resources. ...
There is no formal training department at Headquarters, but there is a corporate manager for human resources with two responsibilities: firstly, to define major orientations for the training policy at the corporate level; secondly, to operate directly certain training programmes where it is deemed essential to transmit a "group spirit".

The latter is a good example of what the functions of a centralized responsibility structure should be. The two most important functions are:

a. Training is identified as a very valuable instrument for unifying the firm's style with regard to customers and also for creating common internal behaviour. It must be said that there are not many other means by which to achieve such a goal. This is one of the most evident current trends – nearly always involving "normal" employees and not managers and a control system that goes from top to bottom. There are many examples of this. An approach focused on employees generally implies a decentralization of training, but then decentralization is reduced to the implementation of training activities, and does not concern the final responsibility for the design and content of the activities. The quicker training activities meet market needs, the higher their degree of centralization.

There is a very large food company, I3, which employs diverse forms of retailing for its different shops (supermarkets, discounters, etc.). More than ever before, today's diversification requires a uniform image for customers, and "company culture":

"In recent years, in addition to the managerial culture concept, which only concerns management, a new and more far reaching concept has emerged: the company culture.

The aim is to make the group's 'watchword' known at every level: in other words, a company culture.

For this purpose a permanent task force was set up consisting of a representative of the lead company, the head of personnel, and a representative of each operating company, usually their head of personnel.

The task of this transverse structure is to identify the training needs of all the companies and to plan actions in the field of company culture.

This means, for example, that the subject of service is not understood to mean customer service only, but a global value shared by every company in the group although each one adapts it to its specific situation.

In this way training, which was initially managerial, works downwards to involve all levels."

b. is the system of internal promotion which, in order to ensure the same conditions, does very often depend on conceptual responsibility and centralized implementation, although middle management in shops have a decisive role in providing access to internal promotion. DK2, a supermarket chain, is a good example of this.

Contradictions between a uniform commercial strategy and success, depending greatly on the specific activities carried out in each shop, also show the ambivalence of training structure development. Thus, taking into account both aspects – let us say functional, and promotional training – the analysis of a particular shop is of great interest for the subsequent stages of our study.

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3.2.2.2 Recent creation of a training structure

In our sample there are a few firms with a long tradition of training and many others which are now experimenting with organizational innovations, new groups concerned with training, content, teaching methods, etc., amongst which we find large firms which did not have a training structure until very recently. Such is the case of B4, a large regional chain of supermarkets. Last year B4 founded a training unit within the human resource department, as an element of a new strategy to direct the market towards a concept of luxury. The change to a single market, which will have a special effect on B4 due to its proximity to the borders, has led to a boom in training activities. Another example is that of two wholesalers who work in association with a series of supermarkets and traditional food shops, NL4. The group first established its training department in 1989 while under pressure from the competition. It must be added though, that GR2 and GR3 are two Greek companies which, with the support of the ESF, recently started training actions, mostly through external training agencies, which will probably lead them to start their own training structures in the future. Some companies in Spain and Portugal have also very recently incorporated training instruments. At D2, a reprivatized ready-to-wear company in West Germany, the training structure is also at a very provisional stage.

3.2.2.3 Training centres within companies

In many cases, companies have their own training centres or permanent training structures or are carrying out projects with training centres (B1, D5, D6, IRL3, I4, DK4, F2, F5, F6, NL2, GR4, UK6, L1, L2. DK2, E5, etc.).

Most of the firms with their own schools or training centres are in the food sector. This could be due to two factors: first, to the growing interest in product training, a characteristic of firms with what we have called a post-self-service sales concept and second, to the need for training middle and top managers in a more intensive and systematic way, especially in chains of shops, with the objective of introducing new, uniform sales concepts.

Obviously, the existence, or non-existence of training centres or structures depends on the size of the company and its staff.

3.2.3 Participation of social partners

The participation of the retail workers trade unions in matters concerning vocational training is, to a greater or lesser extent, fairly common in virtually all countries.

Such participation is of different dimensions, levels and effects, depending on the country. In some, long-established schemes allow trade unions to be present at almost all levels. In others, the growing awareness amongst worker representatives of the importance of training is causing a greater interest and increased demand for the public and private institutions responsible for workforce training to participate.

There are several patterns common to many countries in the area of initial vocational training, although in this case the level of union participation is not homogeneous. Here, we find such cases as Denmark, Germany or the Netherlands, with a long tradition of social dialogue in the implementation of training programmes for the sector. In these countries, the employers' associations and unions serve as advisory bodies in the process of determining the official policy and design of national vocational training and also have certain responsibilities and take specific action in the planning and teaching thereof.

In other countries, social agents play a role as consultive bodies on a national scale. Such is the case of France or Great Britain. Contractual agreements between employers and unions are fundamental elements in the French laws regulating vocational training, and the British National Retail Training Council, an organization with representatives from both sides of industry, has developed the new vocational training programmes in the sector. This group could also include Spain and Ireland, with the more recent, active participation of social entities in the design of the new training plans. In Portugal too, the opinion of the associations is being taken into account when structuring vocational training.

In those countries in which initial vocational training is not established in such a systematic way, employers' associations and unions also have an important role to play. With the help of teaching centres and, on occasion working together, unions and employers organize courses to mitigate the lack of training supply. Such would be the case of Greece, Portugal, Italy and Belgium.

We find an example of such cooperation between social partners in case NL3, a Dutch company. Stichting Opleidingsintitut voor de Distributie (OVD) is a joint initiative, launched in the sector in 1972 when there was no specific vocational training for retailing in the Netherlands. At present, OVD is carrying out its activities through programmes provided by schools, under its supervision and direction. Part of such programmes involves in-firm training practice.

In some of these countries agreements between employers and unions, aimed at improving existing schemes, have recently been reached at a national level. Such is the case in Italy.

The same mechanisms, put in place by the aforementioned social partners, are also applicable to continuing training demands, mainly from those firms which cannot provide their own training structure due to their size or dispersal. Such is the case of NL3.

With a view to on-the-job continuing training, the situation is rather different. However, the involvement of unions on a national scale is developing an incipient culture among workers and their representatives concerning the importance of

training and, as a result, interest in the subject is increasing daily in practically all countries.

Although virtually all workers councils are informed about the training programmes established by the firms, and their needs are considered in some instances, their participation in the analysis of needs and the decision-making processes of a company or outlet is not yet very common.

Different situations are also to be found in this field. Denmark and Germany are probably the countries in which the unions are more directly involved in continuing training, though union participation at the outlet level is, on the whole, very limited.

Such is not the case of D1, where the works council has an outstanding role in training at a company level, and a section of the council is specifically dedicated to the issue. It collaborates with the definition of qualifications and training plans, and fosters specific actions, such as the programme "Women with D1".

As a result of the growing awareness of training, there is a second group of countries in which the debate is reaching the firms. Spain and the Netherlands would be two good examples (by no means the only ones) of the increasing commitment of the unions within firms.

In Italy, France and Great Britain, despite having a long-standing union tradition, the situation seems to be different at present. Possibly also due to a crisis in the traditional trade union movement, the participation of worker representatives has decreased and there are no clear indications that the situation is going to change.

An exception to this is the case of F6. Under the regulations established by the French law on compulsory investment, it has created its own Fond d'Assurance Formation (FAF), which controls the expenditure on training and is managed by a joint employer-union commission. Although its function is almost exclusively an administrative one, it can control the use of investment in training, and stimulate the correct implementation of the training programme designed by the company in the group's member firms. Likewise,

> "The union also plays this watchdog role to make sure that the spirit of the training plan is respected within the training committee of the central works' council" (F6)

The trade unions believe that their participation will increase in the future and they will represent a key element in the assessment of training in the firm.

To sum up, the presence of social partner associations for training in the retail trade sector is, in general terms, a widespread practice with the specific trends and situations discussed above. This makes it quite clear that there is a growing interest from all participants.

3.2.4 Contents and pedagogical methods

The changes in training policy for retail outlets have obviously had their effects on its implementation and are reflected not only in its target public, but also in the content and pedagogical techniques used.

Content is keeping pace with the new realities of the market and its increasing segmentation with, for instance, special emphasis on products or sales techniques, based on concepts of customer service and attention. In addition to this, the content of training activities also responds to the firm's needs, born from modifications to its policies, expansion processes, or other organizational restructuring.

Product training extends to sales staff of all categories, as well as to product lines and department managers, although mostly in the food sector. However, the same trend exists in non-food, mainly in textiles, electronic-electrical appliances, furniture and other specialized shops.

An increase in general-purpose training has also been noted (the market, forms of distribution, department and shop management, merchandising, new technologies in sales, administrative matters, etc.). It is addressed to sales staff, with a special emphasis on company culture and organizational features. Some firms, with management policies in line with objectives, are extending their activities to costs, margins, etc. This tendency towards providing a basic training in distribution, which sometimes lasts for several months and can be divided into modular units, seems to be the result of the following:

a. the need to overcome the deficiencies of initial training or to make it more uniform.

b. the need to prepare the ground for future promotional needs.

c. the introduction or extension of the firm's own culture, as a device for coherence in order to present the market with a chosen, unique image.

One of the most commonly explicit objectives of training programmes for sales staff, traditionally a category of low social prestige, is to appreciate their function and the important role they play as a link between the market, product and service supplier.

With regard to training based on administrative aspects, for middle and top management at sales points, to whom point c. mentioned above is a key element, it has been noted that there is an increasing development of the content matter referring to human resource management and training.

Apart from the fact that middle and top management is sometimes trained as supervisors, the trend towards the decentralization of training

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makes them responsible for all or part of its elements, from need analysis through to assessment.

Two of the cooperatives studied, the only such examples in our sample, provide training activities which have arisen from a special interest in ecological and environmental issues.

Cooperative D6 provides a very interesting and fairly rare example of new socially relevant subjects being taught in CVT. It offers an internal position as "advisor on environmental issues within the retail trade" (Umweltfachkraft), a position to which sales staff can aspire after a two and a half month, full-time course. As the firm says:

> "After having passed the course, the participants should be able to advise the customers in a qualified way, and they should actively take part in the management of the range" (D6).

In the near future, the cooperative intends to have one of these advisors at each outlet.
The content of the training programme is the following:

- Introduction to ecological thinking
- Assortment of goods and ecology within the food sector.
- Degree of environmental friendliness, or otherwise, and health aspects of articles in the drugs and cosmetics sector.
- Introduction to the functions of the "Umweltfachkraft"
- Ecology and marketing
- Selling and advisory service; putting it into practice
- Environmental protection within the company.

As a continuous supplement to this form of further education, aimed at the position of "Umweltfachkraft", there are one-day courses on new developments, e.g. the new laws passed by the Federal Government relating to refuse disposal and hazardous compounds (Abfall- und Entsorgungsgesetze) and the enforcement of the regulations.

Cooperative E3 is also a very interesting case because of its broad array of environment-oriented activities. It has a central consumer council, with consumer councils in each town in which it has retail outlets. With the help of previously trained staff, E3 organizes activities addressed to those consumers who are especially concerned about the conservation of the environment, and its commercial policy is governed by such-minded principles. (E3 was the first Spanish retail company which refused to sell CFC sprays for example).

We shall now provide examples of the content of specific training programmes.

Company B2 has created an extensive programme designed to inform its employees about how retail/distribution works. The programme is directed at all employees and comprises seven modules:

- *Module 1* : Simulation game on the working of a retail/distribution firm
- *Module 2* : Presentation of the general policy of the company
- *Module 3* : How to structure the runge of products of a department
- *Module 4* : Principles of merchandising
- *Module 5* : Orders, stock and inventory management
- *Module 6* : Sale price, profit margins 20/80
- *Module 7* : Profit margin and unknown loss.

NL1 has a course for supermarket managers, with the following content, in its technical and leadership modules:

Technical Modules
NL1 management model
Model personnel management
Logistics management
Commercial management
Cost management
Information management
Management game

Leadership Modules
Situational leadership
Coaching skills
Effective behaviour
Time management

Company F3 has a programme open to any experienced manager seeking to improve his or her skills or acquire additional knowledge. The content of this programme is:

Economic and financial assessment
Retailing strategies
Marketing
Finance and cost control
Purchasing
Logistics
Management
Economic, legal and fiscal environment
General policy

E3, the Spanish cooperative, has embarked on a distance programme directed at sales assistants and cashiers. It develops 4 broad subjects over a four semester course. The first relates to a general background knowledge (distribution and consumption, shop atmosphere, the customer, sales personnel and their functions, etc.). The third and fourth relate to shop management and management techniques. Because of its specific outlook, here we shall only make a brief mention of the second subject: "Getting to know the product":

Fruit and vegetables
Cooked pork products
Dairy products
Butchery
Fish and frozen products
Self-service: Food
Household
Textile products
Home electrical appliances
Cash desks

For all the sections mentioned above the following areas are covered: handling and preservation, work methods, exhibition, sales systems, control, management, merchandising, customer service, guarantee service, technical and health regulations.

P2, the Portuguese company, in its programme directed at counter assistants, includes the following content in four modules:

- *Behavioural area*
  - The firm's image
  - Customer type personalities
  - Personalized customer service
  - Communication
  - Behavioural techniques
  - Firm-customer relationship
  - Time management
- *Marketing*
  - Techniques, concepts and systems
  - Sales area decoration and image
  - The power of the message
  - Scientific marketing
- *Computers science area*
  - Computer systems
  - P.O.S. and terminals
  - Performance and difficulties
- *Customer service quality*
  - Quality, its concepts
  - Difficult cases

Training on new technologies occurs in most companies at the time the new systems (P.O.S., scanner, etc.) are implemented and, generally, takes the form of lightening training activities, orchestrated by the equipment suppliers.

Pedagogical methods in the retail trade follow the general trends in training, with interesting contributions stemming from the need to make training accessible to a larger number of employees with a poor educational background, as is the case of operative staff.

It could be said that, with the odd exception, teacher-centred classes do not exist any longer and, if they do, they are reinforced by audio-visual aids. The techniques most widely employed can be broken down into 5 main groups:

- Self-access. Through correspondence courses, at the workplace, with textbooks or audio-visual aids prepared by the firm itself, with the help of tutors, and with individual written assessments.
- Simulation of situations or workplaces.
- Pedagogical games. Three out of the 55 firms studied, B2, E2 and I1 make use of games which have been adapted or specially designed for retailing.
- Alternation of theory and practice, the latter at the workplace or other premises, with the help of tutors.
- Daily training and communication activities, with short meetings to discuss matters of common interest.

Most firms use a combination of several of these techniques, depending on the employees targeted and the content of the programmes. By doing this, they aim to stimulate trainee participation, their own personal responsibility in training, and a more effective and profitable use thereof.

3.3. Vocational training organization in multinational groups

3.3.1 The X Group – a multinational voluntary chain store[21]

To date, the majority of retail entrepreneurs have limited their activities to one country only. However, there is an increasing number of companies with branches in more than one EC country. Account has been taken of this in the design of the FORCE study of the retail trade by the inclusion of shops of 2 such enterprises, located throughout the EC. One of these is the X-group.

In the case of the X-group we have studies available from four countries, the Netherlands, the group's home country – it is here where the head offices of the international group are located – Germany, Italy and Greece. Here we are specifically concerned with aspects of the organization and the renewal of continuing training. All of the cases share the clear characteristics of voluntary chain stores: the importance of the member-owner in everything that involves group policy. However, there are big differences between the countries which depend on the activities of the individual wholesaler in the chain. For instance, in Germany and Italy they run more shops directly – large specific formula shops – than in the Netherlands, where such formulae are virtually inexistent, or in Greece.

In all countries there was and still is a clear tendency for wholesalers (the number of which is declining through a self-imposed process of concentration) to assume more functions than traditional purchasing, storing and distributing activities. The specific weight of such functions in the group's overall training scheme and its shaping of the market has grown substantially.

On the other hand, the international group in Amsterdam has lost both importance and staff and can hardly be spoken of as a multinational

21 Broader information on the role of purchasing groups in the European retail trade is provided by the Commission of the European Communities, DG XXIII, Series Studies Commerce and Distribution, No. 19, Purchasing Organisations, by Uwe Chr. Trager and Günter Weitzel, Brussels, June 1991.

company. Its function is rather one of coordination, including the attempt over recent years to provide the group with a homogeneous design, notably its effort regarding the imposition of an agreement regarding X's five selling formulae, with common features for all countries.

X Germany (D5) appears to be a voluntary chain store which has, to a certain extent, been converted into a company. This is reflected by the establishment of a wholesale company in 1985, operating in the five regions, with a large number of stores directly owned by the German X Company.

But, despite its development, Germany has not lost its key element, the small independent retailer/owner.

> "The umbrella of D5 comprises on the one hand independent, private retailers who run businesses with a selling space of 100 to a maximum 1000 square metres. As a rule they are grocery shops with a department offering perishable products (fruit, vegetables, dairy, sausage/meat, bread and pastries) and a high service share, i.e. hardly any or little self-service. They are "short-distance supply shops" with close contact to the customer, and are strongly represented, above all, in the Länder of the Federal Republic with large rural areas (such as Bavaria, Lower Saxony) and since recently in the new Länder, too, whereas in the old Länder we observe a tendency towards supermarkets with larger selling space." (D5)

The training structure of D5 is dominated by an internal training institute, founded in 1990 as a result of the group's restructuring. BIDS is the successor of another training institute, but legally independent and conceived as a training agency for X, whose services have to be paid for by the customer. It operates in line with the group structure in the five regions, but with more subbranches in the new Länder, as a response to their training needs. This institute concentrates the group's activities, including the participation in learning as an important part of the officially established German vocational training system. Moreover, they offer promotion and refresher courses. The continuing training supply over the past few years has, to a large extent, matched the range of new products the marketing department has wished to promote.

No information has emerged on the definition of new needs for continuing training based on a critical analysis of the market. Everything seems to be running smoothly, unlike the atmosphere of urgency observed in other countries and cases. The reason for this is undoubtedly the supply of extensive basic vocational training in the sector.

If we compare the situation of continuing training in Germany with that of I5 in Italy, it is obvious that in the second case it is far less systematized and homogeneous than in Germany and internalization is at a very rudimentary level. The group operates through 21 distribution centres (which are the wholesalers) and training is carried out through them. In the distribution centres there is one person responsible for helping with questions of training. The Head Office has a training department, responsible for identifying training needs in the shops, which defines priorities and finds external consultants to run the activities at a regional distribution centre level. The focus is on the application of the new technologies, implemented by the employees and managers/owners. (I5)

I5 seems now to be experiencing important changes which will have an effect on continuing training. The group has initiated reorganization through ten central policies (I5). These can be summarised as an effort to achieve a homogeneous profile for I5 as far as its customers are concerned, with the consequent internal restructuring effects. This change will probably lead to greater importance being attached to the role of the group's head office.

GR4 in Greece, established in 1968, is the youngest of our case studies. It first started its systematic training schemes in 1988. It basically offers initial training for newly recruited employees. The company has its own educational centre, and the courses are given by internal and external consultants. After the first initial training course there is another organized by the employers association (OAED), within the framework of a programme financed by the European Social Fund. Vocational training or continuing vocational training is, however, still at rather an embryonic stage.

The situation of NL4 in the Netherlands – the parent company – is a very different one. It seems that, in contrast with the cases in Germany, Italy and Greece, training as a strategic instrument is far more important in the internal debates in the Netherlands, although the situation differs amongst the wholesalers that dominate NL4. Whereas one opened its Training and Courses department in 1982, the other did not do so until 1989. However, as large shops do not exist in the country, the most acute problem was to try to make the group a homogeneous and dynamic one through its members/owners, using training as an instrument. The level of participation was 40-50%. As they became increasingly aware of the need for training shop assistants on the reality of a specific voluntary chain store, the independent owners themselves would become increasingly involved in the process.

It also became evident from the case study that voluntary chain stores are clearly handicapped in their struggle to hold on to staff, as compared to chain stores owned by large retail companies. The stores in all voluntary chains tend to be rather small, with a fairly flat organizational structure. Furthermore, management functions, for the most part, are performed by the retailer and family members. (NL4)

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Internationale X Centrale B.V., with a staff of 10, is basically devoted to international coordination. In recent years an attempt has been made to achieve an international level of homogeneity in the group's activities.

In short, it is fairly obvious that this multinational group of voluntary chain stores has very little general impact on the situation of each national group.

3.3.2 The Y Company

Both the X group and Y company are very large business concerns. The X group operates in 24 countries, with 22,000 shops (1988) and 158,000 employees, including independent owners. Y operates nearly 1,000 shops in different countries all over the world, and employs 74,000 people (1991). Y shops are stores with a wide range of products while X-group establishments are basically food stores, mainly small-sized shops and supermarkets.

The most striking difference in the structure of the two is that X's international organization is very limited and not very powerful, whereas Y's London headquarters employ around 5,500 people, a strikingly large number. It is fair to assume that there is strong centralization of all decision-making concerning the strategic elements imposed in all countries, and the basic guidelines for human resource and training policies.

> "The role of the headquarters in France is more that of monitoring and directing store activities than of conceiving commercial policy, since the latter is determined directly from England. With a staff of thirty people, the stocking structures are rather modest relative to the turnover handled. The stores are directly linked to the director of operations, which means that the chain of command is fairly short...
>
> While most of the goods sold in France fall within the range defined by the central buyers in Great Britain, adaptations to the local market are possible. In terms of product supply, France follows the lead of Great Britain. The same is true for the store's image, which also emphasizes the quality market segment and thus, in France, where price competition among the different chains is said to be fierce, is oriented to service. In other words, the image created in France maintains the commercial strategies developed in its country of origin." (F4)

In the area of training and human resource policy, decision-making is also centred at the company's headquarters. In all matters concerning training, the two most important elements are London headquarters, with its training department, and the individual stores.

Most of Y's training activities concentrate on initial and promotional training. Although designed at its London headquarters, the structure of initial training reflects, more than anything else, the different situation in each country. This derives from the profiles which have come out of the educational system and the way they are dealt with, combining a selection of short-listed criteria relating to education and initial training or, as can be seen in the British case, by seeking the combination of the initial training designed by the firm and the new system of basic vocational training (UK5).

The structure of promotional training is fairly sophisticated and continuing training for management and supervisors – internally developed and implemented – is reasonably well standardized and always includes instruments for human resource policy and introduces staff interviews as a means of identifying potential.

However, as the firm mainly operates in the upper segment of the market – addressing customers with a medium-high purchasing power – the need for continuing training for all employees in contact with customers arose (without considering their different functions which, as described in the French case, and as seen in the limited new categories used by the Y company, have rotational systems which are not really so expensive). Headquarters invented the concept of "training 30 minutes every week" and compelled its outlets to put it into practice, although in the case of Ireland our sources spoke of only 15 minutes a week. (IRL4)

It must be added that in spite of the prevailing weight of headquarters, as far as training is concerned, there are possibilities for additional activities at the level of the individual firm, as can be seen in the case of one of the outlets described in the British case. Here the manager started a customer service initiative with three elements which went beyond the idea of the thirty minutes training a week. A one-day course on "feeling special", in other words, how the staff feel with the customer and purchases, with a self-access manual and a specific subject to be covered each month. This has meant that the training period has had to be lengthened from half an hour a week on Thursdays, to half an hour Monday to Wednesday one week a month, in addition to the usual Thursday period. The shop is closed while the activities are going on. Training is totally internalized: the employees themselves speak about their tasks and it has become a sort of social event. Nonetheless, the problem of part-time employees must not be overlooked, here things have worsened with the extension of training activities. (UK5)

Comparing these two multinational groups and their approach to and organization of continuing vocational training, it is clear that the obvious differences between them do, to a great extent, depend largely on the type of business. One is a highly centralized multinational company, while the other is an association of independent voluntary chains whose headquarters perform virtually no directional functions. Thus the differences observed in the X-group cases stud-

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ied are obviously more an expression of far-reaching independence than of the group's intention to regard national-cultural idiosyncrasies. What is apparent is the increasing awareness of training needs throughout group associates and headquarter's intention to provide the group with a better defined profile. This could open the door to greater group-wide exchange of training issues and experiments. What is of great interest in the case of Y is the fact that all conceptual decisions, including those concerning continuing vocational training, are made by headquarters while adaptation to specific situations is not initially the task of the respective national headquarters, but of the shop managers. This means that within Y's strategy, the conditions and environment of each shop are more relevant than the so-called national socio-cultural identity.

3.4 A very important target group: The small buisiness owners

3.4.1 Independent retailers

The vast majority of enterprises in the retail sector are SME's. Nonetheless, in our sample of 55 "good practices", there are only 8 enterprises of less than 100 employees. This is of course due to the fact that, as compared to large firms, SME's invest less in the training of employees.

In the literature one finds several references to why it is difficult for SME's to develop adequate training practices. One very often finds that special emphasis is placed on the problem of the low number of employees in the SME's which makes it virtually impossible to use working time for training purposes.

In a recent Dutch research work[22], it emerged that this was indeed a problem for half of the small and medium sized enterprises studied. More remarkable however, is the fact that barely any difference was seen between those SME's that had adequate training policies and practices and those that didn't. In fact, the Dutch research project, covering some 400 SME's in the retail and other sectors, revealed that the size of the SME, together with the qualities and skills of the individual entrepreneur, play a far more decisive role.

In the smallest SME's (5 employees or less), there is not always the need to have employees attend courses. It is often sufficient for the owner to keep a watchful eye out for the relevant developments occurring, and to react in the right way. When the proprietor keeps him/herself well informed, by attending courses – as many do – and/or by other means, it is easy to keep the firm and staff up to date on the latest developments. In such firms, much of the owner's time is spent on the shop floor, working alongside the employees. Thus, together with the employees, the proprietor can experiment with the new knowledge and insight in order to make the firm more effective and/or efficient. Most entrepreneurs that do this find it such a natural process that they don't explicitly see it as a form of training or way of learning/teaching a strategy. Of course, in fact, it is. And it is probably a most satisfactory solution for such firms.

However, such is not the case in all of the smaller SME's. The informal training strategy described above was only to be found in a minority of the smaller SME's. The findings of the survey revealed that the majority of the entrepreneurs of such SME's are virtually or totally unaware of the changes taking place outside of their firms. This being the case, it is obvious that they do not realize the importance of adapting their firms and style of working to the changes, nor the importance of their own or their staff's qualifications. The fact that the further training of the staff of such firms is neglected is thus basically caused by a lack of, or inadequate, entrepreneurial skills. Together with risk taking, external orientation is, after all, a key element of entrepreneurship.

Most of the entrepreneurs of the slightly larger SME's (over five employees) prove to have a reasonably good eye for the dynamics of their surroundings and do, to a certain extent, realize that small businessmen must also invest time and money in the training of their staff. Nevertheless, in such cases, all too often nothing ever comes of it, especially in the retail sector. This is not because of insufficient entrepreneurial skills. Without such skills it would be impossible to sustain or maintain a shop of this size. Often the entrepreneur will spend little or none of his/her time on the shop floor. They have to be able to make the leap from working on the shop floor alongside their employees to the pure management of the firm. Here is where many businessmen encounter difficulties if their business management skills are insufficient. Such entrepreneurs often appear to have trouble in designing adequate personnel and training policies. Not only do they lack the skill to analyse and define the firm's training requirements, they also lack the skill to plan and organize the training of their employees. Most are, however, acutely aware of their lack of managerial skills and request external support.

However, the support they require is not strictly limited to the supply of training activities. On many occasions sector organizations find the courses they run virtually empty. The problem is that, although they are aware of their difficulties, small entrepreneurs are not familiar with the mechanisms that could provide them with the solutions they need and and do not realize they might require somebody to look at the problems from within the company, the problems of adaptation to the environment, management, qualifi-

22 H. van den Tillart, J. Frietman en J. van den Berg, Ondernemen met perspektief. Onderzoek scholing van werknemers in het midden – en kleinbedrijf, 1991

cations, etc., somebody to help identify such problems and seek the most adequate solutions.

The small business owner does not only hold a key position in the firm, they are also of key importance to the other players in the chain, for instance, the wholesale organizations. The latter must feel sure they shall have enough qualified partners in the retail trade, both today and tomorrow. Thus the current growth in cooperation between firms in the retail sector on issues related to training, based on mutual or shared interests. Originally, the efforts made to cooperate on training issues, were primarily aimed at training (prospective) shopkeepers. Today, there is an increasing awareness of the fact that the motivation, knowledge and skills of the staff, from the highest to the lowest, play an important roll in achieving a firm's competitive edge. A top down approach is still understandable as shop owners are increasingly expected to play a part in the training of their staff. The 8 "good practices" mentioned, are in fact, examples of this.

3.4.2 The role of associationism

The need for the continuing training of small retailers has been specially stressed in Greece, Spain, Portugal and Ireland, where very small firms predominate in the sector. The small business owners, with the help of one or two people, most of whom are relatives, run the shop themselves and have direct contact with customers. Thus they are employers and employees at the same time. This group has traditionally been left out of training activities within retailing. However, we must make a distinction between the truly independent small retailers and those who belong to organizations. With special consideration to the situation in Greece, among the different country cases we have found others which explicitly deal with the same subject. For voluntary chain stores, the continuing training of owner-members has become one of the strategic, key issues of the future.

There follow some examples which illustrate the situation of voluntary chain stores and their response within a structure in which the owner-members maintain their economic independence.

F1 is a regional group of a voluntary chain of supermarkets, superettes and hypermarkets, dealing mostly with food products (90%), around 40% of which are fresh products. The organization has 115 owners/members. In all, the firms in the organization employ around 4,000 people, and the regional group itself – whose basic function is that of a wholesaler – employs 500. Thus, the group's human resource department has three different clients: the owners/members, members' employees and group employees.

As we have already seen, in many cases the importance of training is recognized and the restructuring of training systems goes through a critical perception of the position of firms in the market – in this case through serious economic problems in the early 80's. Nevertheless, for voluntary chain stores, the members are the most sensitive and important element in the decision-making process concerning the changes to be made in the sector. In the past, the group training department provided its members with courses of various types and diverse content, taken by external consultants. This traditional type of continuing training is going to change drastically very soon:

> "Training now is seen as an important factor of group cohesion" (F1)

The diagnosis of the group's structural problem was that the dispersal of experience, concepts and knowledge of over a hundred members makes it very difficult to coordinate efforts and present a homogeneous image of the group to customers.

The method that the group employed for the analysis of its problems, in order to seek possible solutions, is a very interesting one. A workgroup of ten members was established. Over more than 20 day and a half long meetings held in 1991, the workgroup studied the following topics:

- commercial policy and sales promotion,
- organization of the store and flow management,
- accounting, finance,
- human resource management.

The result was a highly practical guide for the shops and the group as a whole, providing great methodological detail and "really defined work organization" (F1).

This was the origin of the training structure for the future, based on the owner-members as the first target public. The structure would be one of continuing character for those who were already members of the group, and initial training for new members (in the group's process of expansion). To such ends the group has opened a trade school (F1).

It is aware of the fact that all employees must have access to continuing training, but at a shop level. For the activities carried out near to or at the workplace, the shop may receive an allowance of 70% of training costs, under the terms of an agreement with the Ministry of Labour. The owners who have already been trained act as the trainers of their own employees, in line with the following policy:

> "The whole of the personnel is to develop together, and the owner, who has already been trained and familiarised with the new work methods, cannot constitute an obstacle to their adoption." (F1)

However, it has to be remembered that these are very recent guidelines (1991) that are only just being put into practice. What is obvious from this example is that, faced with a highly competitive market, the traditional formula for voluntary chain stores – a response to a previous critical market episode – the advantages gleaned from purchasing from the same supplier and of using

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the same name are not sufficient for survival in today's market.

The basis of cooperative I4's policy was indeed the advantages to be gained from joint purchasing:

> "Today I4 is one of the four biggest Italian distribution chains and has a system of firms throughout the country specifically created to satisfy the most modern consumer and market requirements. The organization includes member retailers, large purchasing groups, modern distribution centres: a network of specialized and multi-channel outlets throughout the whole country." (I4)

I4 is the most important member of the national association of cooperatives, which brings together 30 cooperatives. The I4 group is in full expansion, with the opening of hypermarkets in the Italian provinces and the creation of a new formula for shops: convenience stores, open most of the day and located near petrol stations. What, however, is essential to the group is its neighbourhood shops, because "the Italian shopper also tends to remain true to the corner shop". (I4)

In the field of training we see great similarities to the case of F1, which reflects the characteristics of a voluntary chain store. But throughout the history of I4, according to the case description, there was no crisis which provoked the adaptation of concepts, but it was the expansion of the group itself which made it necessary to train "function managers" in order for the shops or groups of shops to act with greater autonomy (I4). This was why administrative and commercial questions were so predominant, and why such problems as how to sell, how to present a shop, etc. were not included. Nowadays, the concept of training is oriented towards giving support to each shop's needs.

As the organization was constantly adapting to the changing market, a training body was set up in 1987 to internalize vocational training which, to that time, had been carried out with external help. This represented a turning point for I4's training policy. I4's training body operates from within the national association of cooperatives, but mostly works for I4. With a view to the group's internal structure, the relationship of the training body with a specific shop is not a direct one, but works through the cooperative to which the owner belongs. With the internalization of training, there was no break between the traditional initial type of training for new members and refresher courses for a strategically very important group: shop supervisors.

Very recently, as has occurred with other companies or groups, I4 has also started to put more emphasis on training groups other than members and supervisors, that is to say, all employees in direct contact with customers. It is also evident here that for "normal" employees, activities have to be organized in short modules and carried out near the workplace. Thus, a present objective of the group focuses on "training operators", employed on a chain basis, or through networks specialized in different selling techniques. Audio-visual aids are also used in this case:

> "One of the major innovations in the field of training in the last two years was the introduction of audio-visuals ... Most audio-visuals are designed for sales staff and their characteristics differ for each channel.
>
> A very general and comprehensive audio-visual dealing with customer relations is one of the most important ones.
>
> Even its title, "One more reason: courtesy", already clearly defines its aim: a standardized staff behaviour code designed to give customers maximum satisfaction even from the human angle.
>
> The film, which lasts one hour and twenty minutes, is accompanied by ample documentation and is introduced by a training officer, usually a network operator from the territory who has been specially trained for the task."

Among the examples of specific shops or groups which do not fit into the description of the case, there is a hypermarket which also provides training for cashiers:

> "... which will continue to be given priority... These employees play a strategic role because the most important part of the firm's image depends on their relations with customers"

This is easily understood given the selling formula of a hypermarket.

Under the title "A very important target group: the owners", so far we have presented examples of voluntary chain stores or cooperatives, generally from the point of view of the most important economic features and support structures for older members. However, among such members there are many who would fit into the definition of employer-employee suggested by the Greek experience.

In order to round off this overview, we shall now deal with a very interesting example from Belgium. It combines training and support to employer-employees in very small firms in the furniture sector, operating in a very demanding segment of the market in which there is a highly sophisticated concept of customer service through continuing training.

The case in question is B3, a small furniture firm with nine employees, including the parents and two sons. It buys furniture, sells it to private individuals, and installs it. They mainly work with a furniture wholesaler and make extensive use of the training provided by an organization which specializes in the furniture sector. The concept of

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training is an outstanding one because customer service is considered to extend to telephonists and, more importantly, to the furniture installers.

> "The supply of training comes down to 4 programmes:
> a. salesmanship and selling techniques, b. reception, c. installation and d. guidance of salespeople for managers. ... The core of each programme is the body of attitudes and techniques associated with what is called a customer-oriented approach. The challenge is that not only salespeople and shop assistants interact with customers but that receptionists-telephonists and installers do so as well. ... The background is that, since the target group among customers is changing, it is necessary to raise the qualifications of sales personnel in order to meet ever-increasing demands with respect to information, after-sales service, etc."

Teaching procedures mainly involve practical training, with a manual and audio-visual aids, and also consider the importance of the employees knowing the two languages well. All the courses are given in special premises, in a very pleasant atmosphere and surroundings.

The multinational group X that we have studied in four countries, is also tackling its first strategic problem: the need for the participation of associated voluntary members in order to achieve a homogeneous sales concept throughout the group.
In different countries, the problems of small independent retailers and their employees are handled by different associations. The greatest issue is the suitability of the pedagogical techniques and the availability of time. Small retailers with their limited staff, are not able to leave the workplace to attend training activities, often not designed for people with a low level of initial education. These restrictions require joint action from the owners/associations in order to find pedagogical (audio-visual aids, interactive TV, correspondence courses, etc.) and practical solutions to continuing training for these categories.

3.5 Groups of employees as target groups

3.5.1 Overviews and tendencies

The purpose of this study is to examine continuing training. We have defined continuing vocational training as an activity for people already in employment, financed totally or partially by the company, taking place during working hours and aimed at improving the worker's job-related skills. This definition can not be used exclusively in all cases. In our sample, there are companies in which there is no clear difference between CVT and other types of initial training given prior to occupying a given position (introductory seminars, trainees, officially established basic vocational training, etc.).

The data which follows, concerning the frequency of continuing training for different groups of employees, is based on those activities explicitly mentioned as continuing ones. They correspond to 50 of the cases studied (excluding the associations).

We have also included the cases of staff with working experience, but no initial training, currently involved in continuing learning processes, all be it short-term. We understand that in their work they have already acquired a certain level of initial training in 'learning by doing'.

Training and continuing training for different target groups
Base: 50 cases, data in percentages.

	Training	Continuing training
Stock	24.4	Not identifiable
Cashiers	73.3	26.6
Shop assistants	91.1	80.0
Middle management	93.3	68.8
Part-timers	40.0	31.1

It is not surprising to see a high level of training activities in our sample, not only at an initial level, but also on a continuing basis, with greater attention paid to shop-assistants. The information gathered from the case descriptions clearly shows that continuing training for middle management (and certainly for top management) usually lasts longer, provides greater comfort, in terms of facilities, and is, at times, more sophisticated in its content and teaching techniques. Notwithstanding, if we accept that the cases in our sample show certain tendencies, we are no longer able to say that continuing training in retailing is almost exclusively addressed to management (or to owner-members, in the case of associations). We must also say that it exists for cashiers (although predominantly initial training) and part-timers.

In 80% of the cases studied, it has been said that continuing training exists for shop assistants. It is more common in non-food outlets (88%) than in food shops (68%), and far more common in all the stores and cooperatives involved (100%). It is less prevalent in super/hypermarkets, where the number of shop assistants involved is not so high (but still 72%). As far as the size of the outlet is concerned, it was seen that the smallest – up to 100 employees – involved all their shop assistants in training, while the largest only involved half.

In the case of continuing training for cashiers, the difference in frequency is explained by the products and type of retailing. Frequency is over the average in the food sector and cooperatives (mainly supermarkets with a predominance of food sections), and in super/hypermarkets or multiple types (up to 38%). The figures for department stores are very low due to the fact that very frequently it is the shop assistants themselves who take the cash and the central cash-desks are only used for specific buys.

Multinational companies are not per se the most active in continuing training for such groups of

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employees: in all three categories they are found to be below the average, especially with cashiers and part-timers.

According to the data available, it is the stock employees who are most frequently left out of any type of training in the retail trade.

3.5.2 Training for part-timers

Part-timers make up a high percentage of the workforce in retailing, almost 50% in some countries. The future evolution of this category will be different depending on the development of the retail trade in each country and certain national features. For the time being, it seems that this contingent of workers will continue to grow in countries such as Greece, Portugal, Spain, etc., whereas it is stabilizing in others like the United Kingdom or the Netherlands.

Initial training is well-nigh general for these workers. But such is not the case with continuing training, far less with promotional training. Nevertheless, there is a growing awareness among management of the need for training these employees, who bear great pressure and are in direct contact with customers at critical moments.

In general, it is difficult for part-timers to access continuing training, as it can occur at times which do not fit in with their shifts. None of the firms in the sample explicitly rejects part-timers when training is voluntary, although there is a selection process for them. At all events, attending training activities out of working hours represents an effort for which the compensation is not adequate. In those companies which organize training activities in working hours, and in which training is compulsory,

> "If they do not work in the mornings, they can miss out on training." (UK5) but also, "The training department came to realize that with the increase of part-timers, the 30 minutes on Tuesday mornings affected only eighty people... and it organized extra sessions during the day." (F4)

There is information about continuing training for part-timers in 14 of the 55 cases, but we must bear in mind the fact that some of the enterprises do not employ part-time workers. However, with these rather low figures it would appear that there are two concepts of personnel policy for part-timers. One treats them as a marginal group while the other as a group belonging to the permanent structure of the firm, but on a flexible basis. The latter are potential clients for continuing training, although there are a good number of organizational problems involved.

There are companies in which access to training is voluntary and there is a high percentage of part-timers:

> "The ethos is that as these individuals would find it difficult to get access to training, this should go to them. All training so is based on flexible modules ... and trainers can be available to all workers in different shifts." (UK1)

In small outlets of a local nature, with a more complete concept of customer service and good product knowledge, and female part-timers employed due to the characteristics of the labour market, the training of such workers is as important as training those who work full-time. (Examples in UK3 and UK4).

Part-timers obtain greater attention from department stores and very large firms (which in this case are one and the same: 50% of the largest firms carry out some kind of activity in this field), as do the cooperatives.

With regard to access to promotional training, the situation is rather difficult for part-timers, as being a full-time employee is an indispensable requirement for some firms.

> "Part-time employed persons only very sporadically participate in such promotional measures. It is true that they are not directly excluded from continuing educational measures as such, but in principle, only full-time employed persons are assigned for executive positions" (D4)

3.5.3 Training for ethnic minorities

The ethnic minorities employed in the retail trade are to be found in the countries in the Northern area of the EC. Some of the cases studied in Denmark, the Netherlands, Great Britain, Luxembourg and Belgium provide information about the proportion of foreign employees in their staff. Such is the case of UK5, where 5.3% of the staff belong to ethnic minorities or NL1, with around 2%. Only in the latter are there specific actions addressed to the groups, with specifically designed courses for those who would like to and have the capacity to be trained in management. These courses were to go into operation in the middle of 1992. Likewise, NL1 will start a course for supermarket managers, called "Multicultural Management", which aims at stimulating cooperation between Dutch and foreign employees. There are no further examples of specific action for ethnic minorities. Although their representation in middle management, and certainly in higher categories, is low, this could derive from the fact that training is not adapted to their possibilities.

3.5.4 Training for women

In most of the firms studied, women comprise up to more than 70% and, in some cases 90%, of the workforce, and are the dominant group in part-time work and operative categories. These two aspects, part-time work and the few women in positions of responsibility, are a common feature described in all case studies. In some, the lower wages paid to women as a consequence are also noted.

The absence of women from management positions is accounted for in some cases as follows:

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"Women who represent the majority group of the workers show low interest in promotion. Their ambitions are limited to doing good work which give them the opportunity to combine professional satisfaction with the requirements of their private lives" (L2)

"While there are as many women as men on the employees level, only half as many of the supervisory level, and they constitute only 20 percent of management. This imbalance seems to us to reflect the disappearance of internal promotion, or extreme selectiveness where women are concerned. (A woman employee has ten times less chance of becoming a manager than her male counterpart)" (F6)

"According to the firm, the few guarantees of a total dedication on the part of the women for occupying responsibility positions, make their access to them difficult, even more if they are married" (E1)

These quotations are still reminiscent of certain society stereotypes and habits, which make women's access to professional careers very difficult.

It is a paradox, on the other hand, that 2 of the most commercially successful firms, both with an enhanced public image in Europe, are mainly directed by women and have women occupying most of the managerial positions. (I6, E4)

Denmark appears to be the only case in which the proportion of women in mid-top management positions is the same as it is in the sector as a whole.

From our sample we found 4 firms with specific programmes, of a different nature. NL1, a supermarket chain, is one of them,

"In 1988, the campaign "woman at work" was launched. This campaign aimed to achieve a change in attitude among men and women and to make women more career conscious. Various means were employed: targeted mailing at women, posters in the branch stores, attention for this subject in the internal TV network which features "NL1 News" every week, conferences...

At the same time, activities were undertaken, intended to facilitate the career progress of female employees, which included regulations regarding parent leave, career policy and child care. (NL1)

and D1, the third largest department store in Germany,

"Since 1989 a programme for women's promotion exists which has been reconciled with the general works council; in this respect a slogan of the enterprise "Women with D1" expressing that the firm has bound itself publicly to grant special attention to women and support their promotion: the main goal consists in the increase of the women share within higher management positions and in the development of measures aiming at a better compatibility of profession and family." (D1)

D1 has a work team engaged in the project, directly supported by the Human Resource Director, and documents are signed annually to ensure its implementation.

"The special aspects of the promotion of women are:

- The possibility of extended child-raising period for both parents.
- Male and female employees on child-raising leave will get social and training benefits paid by the firm for the duration.
- After the leave is over, employees have the right to return to an equivalent position, if possible at the same workplace.
- In order that mothers can attend training seminars lasting for several days, the activities are carried out in places with child day-care facilities.
- With the recreation home owned by the enterprise, single mothers gain the additional possibility of bringing their children along with them.
- In some stores, an agreement is being signed to allow women working on the "langer Donnerstag" to have the option of taking a taxi or using public transport" (D1)

We are going to give another of the rare examples of positive discrimination helping women's promotion, in this case we are looking at clerical officers.

The majority of IRL3's clerical officers are female and the organization, recognising very few of its senior and middle management team are women, has taken a number of actions to redress the balance. They have appointed an Equality Officer – IRL3 is one of the very few organizations in Ireland to do so. IRL3 has also developed a career development programme specifically for female employees.

The career development programme is intended to assist women in identifying and developing their own abilities, personality characteristics and occupational interests so that they can optimize their career potential within IRL3. The programme also aims to help women to determine their educational and training needs in reaching their career objectives and it also assists them in writing their own personal action plans. Finally, the career development programme provides participants with an opportunity to develop some of the skills needed for personal effectiveness. As a senior manager in the training and development department observed, if a man is promoted he immediately starts thinking of the next upward career move while a woman in a similar position feels that he has to prove herself in the new post before setting her sights on the next promotion opportunity. The career development course is open to female staff members in

the retail appliance shops and a number have already participated on the course.

Part of the career development course concentrates on life style skills with the aim of helping women to think through their own priorities particulary whether they are working for a career or just purely to provide an income for their family. The course is designed to help women to feel comfortable with their career choice. Also included in the course is psychometric testing which for many participants is an eye-opener as it helps to identify their particular strengths and weaknesses relative to their working duties.

3.5.5 Some examples of continuing vocational training for specific target groups

We shall now pass on to a brief description of what is understood as continuing training for these target groups, paying special attention to the new forms of short training programmes near the workplace.

Next we wish to provide some illustrations of the concepts of continuing vocational training implemented in the different case studies. In particular, we wish to present examples of target groups, which are becoming more important in the field of vocational training in the commercial sector. It is true that there have been many changes in the teaching and content of both managerial and promotional training. Later, we shall also provide information on these changes, particularly if managerial training deals with the objective of facilitating access to continuing vocational training for sales assistants or cashiers, since it is quite clear that for the application of a new training-philosophy to be successful in an enterprise, top and middle management are the key groups that have to feel convinced as to its efficacy.

3.5.5.1 Cashier training

At the time of the study, supermarket chain B4 had only one programme (out of the whole plan) which was ready to start training to welcome clients (cash register department), more generally known as "cashier training".

The general aims of this newly designed training programme are: to make the cashier sensitive to the impact a good welcome to clients can have and the different forms of welcome available, and to teach them how to cleverly tackle customer complaints. The idea is to motivate cashiers and reaffirm the value of their work. The course is compulsory to all cashiers and is given at the so-called "enrichment workshops", to groups of around 12 people. The training course is held four times, lasts for half a day, and its content is organized in three modules:

1. What the client sees and hears – theoretical aspects. The themes covered are: appearance (clothes, make-up etc.) and language, this is how you should address a client. They work with video simulations of cash register situations;
2. The practical aspects of the first module, with instruction from a specialized school for hostesses and beauty specialists;
3. Here the question is whether the customer is the "king" or not, and involves an analysis of different types of client contact, and the acting out of different situations. (B4)

3.5.5.2 New training approaches for sales personnel

As has already been mentioned several times, our case studies show a clear tendency towards introducing new training concepts for sales personnel, seeking innovative didactic solutions. A different approach to training is to centre it around the workplace and make training sessions brief. We shall now give some interesting examples of such endeavours.

3.5.5.3 The weekly thirty minutes

One of the multinationals we examined – a department store company – carries out a weekly thirty minutes training activity sessions for staff, not only sales personnel, but also administrative and back office staff. Below we have provided an example from the French case F4:

> "Every Tuesday morning, the store opens at 10 am instead of 9:30, but the entire staff comes in at the usual time. During the extra thirty minutes, training sessions affecting all the personnel take place in various forms: plenary sessions held in the restaurant, small groups meeting in the training classroom, or in-store sessions organized section by section." (F4)

The plenary sessions, or the substitutes thereof, in big stores are organized when management seeks to inform the staff on general issues concerning the company and other similar subjects.

Small group sessions in the training room are organized on special topics. In the large shops visited they hold not only Tuesday morning, but also Thursday and Friday daytime sessions for groups of about 30 people, thus they communicate with some 160 people per week.

"Since the beginning of the year, the following sessions have been organized:

- preparation of inventory, via explanations on transparencies and practical applications, plus direct assistance on-site during inventory (3 sessions);
- callback procedures for discounted goods (1 session);
- employee dialogue (1 session);
- awareness campaign on behaviour towards customers, known as SBAM (sourire, bonjour, au revoir, merci) (3 sessions).

On the basis of directives from the home office concerning the basic message, the training department created its own media. The goal was to come up with compelling materials that would not put off the personnel and lead to re-

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jection of training. The following strategies were developed:

- store-wide poster campaign in a humorous way ("We all SBAM");
- one game session around the identification of the key words in the campaign (smile, hello, goodbye, thank you). Showing of video on courtesy;
- one game session called "Find the mistake" (between sections that "SBAM" and sections that don't "SBAM"). Showing of video on courtesy at the cash register.

In general, the training department attempts to generate sessions during which the trainer draws on the creativity of the participants. No one imposes a solution or a standard behaviour on them, but rather, they are to discover it themselves through the information given to them. This is a participatory training method."

The thirty minutes also can be used by the section instructors or supervisors to train "their group around a particular topic that only applies to that section (displaying the lines, comments on department sales, operational problems etc.) ...

With the development of complementary sessions during the week, the thirty minutes on Tuesdays morning are increasingly devoted to training in the sections, and things seem to be moving toward two sessions a week for each employee..."

3.5.5.4 Playing cards

At E2 – a supermarket chain –

"The most important programme, tried out in 1991, started in 1992, is addressed to all the employees whatever their category is. At the start, it is only addressed to those employees with permanent and temporary contracts for permanent positions.

The programme arises from the need on the part of the firm to introduce effective training at a low cost.

The characteristic features of traditional training are not attractive for adult semi-skilled workers, because they are afraid of having to study, and because of the lack of stimulus and their complexes, lack of confidence, and their difficulties with concentration.

The awareness on the part of the firm about those facts mentioned above encouraged them to develop a new product, based on a game, which can let them train all types of workers, ... patented under the name Triforvial. ...

As can be deduced from its name, the game has something to do with "Trivial Pursuit".

"The programme addressed to middle staff and unskilled workers deals with the following items: the market, the shop, the different sections, food products, administrative and computerized management, commercial management and computers, personnel management, the customers....
The supporting material for the game in its two versions is the same: Some cards, a board (sort of chessboard) with markers....The cards have a logo on them identifying the item, which is the same that appears on the board.

The training programme/game goes on as follows:

Every week the employee is given a fixed number of cards, same size as playing cards, to read and study. The cards will correspond to different items and will provide detailed information about them. The cards will be distributed accordingly to the logical process and period of learning.

For instance, for a specific employee, the cards for one week could be the following:

Card 1 Item :"The market" – "commercial distribution" – the hypermarket
Card 2 Item "The shop" – "Distribution of the products in the premises": cold spots, maximum interest spots
Card 3 Item: "The different sections"– "Drinks sections": aperitifs, brandies and spirits.

And this goes on...for about two months, at the end of which it is assumed that the employee has learned a certain amount of information. It is then when the game begins: for a fixed time within working hours, two or three hours a week, the employees – mixed up categories and positions within each level of the game-, play the game on the board making use of their luck and knowledge.

The board shows different paths, in the shape of squares, varying and difficult ones, with stops and backward steps, which go towards the finish. Each player has four markers which he will have to take to the finish. They throw the dice, and they will have to answer about the item shown with the logo in the square, and they will move forwards or backwards, or they will have to stay there depending on their answers, etc.

It is a knockout competition. Different games will lead to the winner, and to his/her two immediate rivals. Then they will get important cash prizes and in kind prizes for them." (E2)

3.5.5.5 Methodological tips

D1 is also an interesting case with its daily 10 minute training sessions. The project is still at an experimental stage. The method is the following:

The company has developed a set of cards with key words and the explanations thereof. For example, the subjects covered are: "presentation

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of goods", "how to behave to the customer", "legal questions", and so on. The department manager chooses one card every day, it is explained to the members of his/her department and a short discussion ensues. The set of cards may be added to and the employees are invited to propose subjects to be included in the set. Furthermore, the employees may use the set of cards as a self-access manual.

3.6 Qualification needs and training plans

3.6.1 Training plans

It is very rare to find cases in which no information on the planning of training is available, despite all of the differences between countries and firms, as our initial definition accounted for the selection of cases with a certain degree of consolidation in their training programmes. The firms normally have a written one year training plan, mostly providing a specific list of the training opportunities, target groups and duration. At times the training plan will provide the framework for the specific training activities required for the coming months. Other companies run more global training plans covering a couple of years, and from one year to the next they decide on specific activities.

Below we have provided some examples. The case studies furnish much information on concrete training programmes, the organization of training within the enterprise and the level, if any, of the participation of worker representatives in the development of the training programmes. But we have no information on the physical form of the training plan. That is, is it a document which circulates from department to department, or are the options available pinned up on notice boards, is there a book available to all, or is there a target group to whom specific information on training is made available? What does a training plan really cover besides the structure of the training offered? That is, is there any written information on how to obtain access to courses, is there a more extensive description of the courses, are the preconditions and requisites specified, and so on.

At this stage of the study, considering the possibilities of transferability, all such questions appear to be important and should be discussed in any possible follow-up studies, for instance in a guide. The formal presentation and way of distributing a training plan in a company also conditions the perception of continuing training by the staff and expresses the specific importance an enterprise attaches to continuing vocational training.

The information received on training plans shows that a training plan is normally a one year project, encompassing the overall training philosophy of the enterprise. That is, the most important strategic issues to be met by training are expressed by the main lines of activity. Below we have given the example of case study E3, a supermarket cooperative.

The 1991 training plan consisted of the following most important training opportunities:

Continuing training programme	*Duration*
Master in management	*420 hours*
Management learning	*80 hours*
Introduction to management studies(I.G.E.)	*two years*
Training plan for sales directors	*61 hours*
Management functions	*16 hours*
Management techniques	*28 hours*
Preventive maintenance	*28 hours*
Scanner	*8 hours*
Culture changes in supermarkets	*20 hours*
Textile department training	*24 hours*
Non-food department training	*24 hours*
Fishmonger department training	*24 hours*
Butcher department training	*24 hours*
"Charcuterie" department	*16 hours*
New partners programme:	
Training as partners/ employers	*16 hours*

Training for the unemployed: 500 hours per course on average for: cashiers, perishable-product shop assistants, butchery, non-food shop assistants, shop manager, "charcuterie".

This is a broadly oriented training plan, reaching out to many people: around 1,000 people took part in continuing vocational training courses and another 910 in those for the unemployed. 700 of the latter later joined the cooperative as new employees/partners.

A training programme of such scope expresses the great importance attached to training by the cooperative and requires a specialized training unit. In addition to training activities scheduled at the beginning of each year, there is a special budgetary item retained for unexpected situations or specific needs related to areas susceptible to improvement through training (see Spanish national report).

In the case of a UK department store continuing training plans for the whole staff are defined in a communication process between the local training coordinator, who identifies the needs, and the company training coordinator who produces the training schedules, materials and so on. Provision is made for the store managers to propose vocational training initiatives. So, in one store, in addition to the training plan agreed with the company training coordinator, the store has developed a monthly training scheme, aimed at increasing the product knowledge and service skills of all staff. Some of the areas recently covered were:

January – food products: a series of posters about "60 fascinating food facts", an internal food tasting session plus talks given on food by suppliers,
February – "money" including a seminar on the Company pension scheme, theft and loss etc.

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2.

March – "textiles", including an internal fashion show.

Future planned events are in place for the next four months (See UK report).

As has just been stated, there are enterprises which develop their annual training plans, not only with regard to current needs, but also with a view to stabilizing training routes or concepts for the years to come, as can be seen in the case of a Dutch enterprise and its internal career-oriented training routes (Dutch report).

Figure: The internal career-oriented training route

	A Shop assistant	B Senior salesman	C Department manager	D Business manager
1. Level of initial education	MMO/MDGO-MK (Full-time only)	MMO/MDGO-MK	MMO/MDGO-MK	MMO/HBO
2. Testing of socio-normative qualifi-cations through assessment centre	sometimes (full-time)	sometimes	yes	yes
3. Number of times that course is or-ganized yearly	6	4	2	1
4. Number of persons each time	10 to 14	10 to 14	8 to 10	8 to 10
5. Course content	• Dealing with aggressive behaviour • sales techniques • presentation	As A, but more in-depth +product knowledge	• executive skills • goods process • approach of consumers • management information	• personal management planning and organisation • thinking and acting commercially • profit orientation • training
6. Teaching methods	theory/training [1] learning in practice	theory/training [1] learning in practice	theory/training [2] learning in practice	theory/ training [2] learning in practice
7. Extent of theory/ training • total number of days • per week	5 1	5 1	12 1 to 3	16 to 25 1 to 3
8. Theoretical part organized by	store manager	store manager [3]	• store manager [3] • specialists • training department	• sales director • specialists • training department
9. Supervision in practice	own store manager	own store manager	own store manager	own store manager
10. Diploma/ certificate	certificate	certificate	certificate	certificate
11. Salary conse-quences	no	not yet clear	yes	yes

[1] Takes place in company training centre

[2] Partly in training centre, partly residential

[3] Often the business manager of the branch

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This example represents a type of training plan which might be new and characteristic of this new stage of development in the retail sector: more and more elements of the training plan are founded not so much on a "photo" of the current training needs and deficits but more on overall enterprise strategies and thus, more systematic and more closely linked to other strategic activities. This could also find an expression in the new organizational solutions for training, as is to be found in the Italian case I1, where training is currently closely linked to the quality department and does indeed share the same department head (see Italian report).

Another example is the Belgian supermarket X-group B4 , which has recently developed a three year continuing training plan for all supermarket staff. (see B4)

The new global training policy

Given the new commercial strategy of the company, it became essential to train staff as an integral part of such a strategy.

The main aim is: more professional sales and better client service.

The second aim is : improved management.

And, in order to achieve these aims, it is essential to have competent staff.

All the employees of all the supermarkets in the group are involved in this global policy, that is, approximately 1,685 people. Training is compulsory for each and every one of them.

The management not only hopes to achieve the objectives of the programme, but also that such training will provide a solid basis for internal promotion.

Three levels of training are to be organized:

- Technical knowledge for product competence;
- Correct use of computer and new materials for management competence;
- Client relations, for competence in different aspects of human behaviour.

The training plan extends over a three year period.

This is a far-reaching new training policy, aimed at achieving a high level of competence. It has an entire section devoted to "communication" and "psychology".

At present, only one part of the programme is ready: training on welcoming clients (cash register department), more commonly known as "cashier" training. A description of the programme is provided below.

Description of the main programmes

a. The new "cashier" training

This programme is devoted to client relations.

It includes three modules:
Module 1: presentation, language.
Module 2: what the client sees and hears = practical aspects.
Module 3: Is the customer the "king"?
Duration: 2 days.

b. "All-rounder" training

In a store, whatever the cause of the problem may be, there must always be somebody physically available to provide service to the client. A solution to this problem, is called the "resource" team.

The programme comprised three parts:
- A theoretical part, given by a professional school;
- Client relations, taught by Forem (regional employment service);
- A practical part which takes place in the X-company stores.

c. "Fresh produce" training

"Fresh produce" training includes three modules:
– one for the department managers;
– one for the assistant department managers;
– one for sales personnel.

Each participant has their own training check booklet and a practical guide to fresh food. This is a booklet with a separate leaflet for each type of fresh food. This practical guide includes three major topics for each product:

– product quality;
– how to store it;
– reference pictures.

The results of the training programme are evaluated halfway through and at the end of the programme.

d. "Store manager candidate" training

This is a tailor-made training programme based around the background of the candidate. It includes "fresh produce" training.

e. "Wine counsellor" training

This programme is for the store managers and their assistants. It includes theoretical and practical courses.

The programme is not part of X's global training programme. It reflects the desire of 12 local firms to develop a management programme for young people, to provide them with a better chance of finding a job.

It is a one year part-time sandwich programme: 22 weeks at school and 18 weeks at the enterprise.

It comprises:
– computer training;
– human resource management;
– general management
– practical knowledge of foreign languages.

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Those who successfully complete the course could eventually be hired by X as assistant-managers.

But such sophistication in the planning and presentation of continuing vocational training seems more the exception than the rule for the sector. The Portuguese national report sums up the situation as follows:

"Considering planning as a development processing which joins three stages, a preparatory one, a second of performance and a third of evaluation, we shall conclude that the vocational training planning is still very incomplete in the retail trade sector. ... An important number of the vocational training courses which were done, have been (and are) planned in a very limited way, the minimum to obtain the financial support of the state and/or the European Community and the inherent aspects for their performance."

So the report on Portugal is clearly referring to a specific situation, in which the recent dynamic development of continuing vocational training is closely linked to the support from EC funds.
But if we accept that a training plan should reflect the three above-mentioned stages, all of the cases studied present deficits. Thus, in order to obtain a truer impression of the existence or lack of a systematic approach, we should ask ourselves the following question: Is there any procedure which could be understood as an analysis of training needs or qualification needs? If so, is there any transfer from analysis to training planning?

Of the 55 cases under analysis, there are currently 26 in which such is the case.

3.6.2 Qualification and training needs

In our sample we found the following six definitions of future training needs:

1. One way of getting to know future training needs is by means of "dialogue", with the participation of worker representatives, as is the case of D6:

"Once a year the Educational Academy of the group prepares a plan/curriculum being coordinated with the heads of the districts as well as with the works council whose suggestions and innovative proposals are going to be included into the programme of continuing education if the demand turns out to be sufficiently high. In this way, one attempts to react to the particular needs as promptly as possible."

2. Another formula is that of "definition of needs by management", but as shown in the case of NL1, with good procedures for its enactment:

"Meetings are held on a regular basis in which, next to the 4 personnel officers on the area-level, the head of personnel affairs in operations and the head of employee training in operations, participate. The problems and bottlenecks occurring within the company form likely agenda items. This can result in the employee training department being assigned either to find a solution or to subject these problems and bottlenecks to further analysis.

In the latter case, a project leader from the employee training department is appointed, who will subsequently draw up the project proposal on the basis of a preliminary study, detailing, among other things, the required time, expertise and funds ..."

A system which is quite similar, but on a larger scale (due to the complexity of the firm, with a large number of different types of shops, etc.) is to be found in case study I3. However, here it is organized in a separate way, within the hierarchical structure of the firm:

"For this purpose a permanent task force was set up consisting of a representative of the lead company, the head of personnel, and a representative of each operating company, usually head of personnel.

The task of this transverse structure is to identify the training needs of all the companies and to plan actions in the field of company culture. ...

In this way, training, which was initially managerial, works downwards to involve all levels."

In the case of E5, it was also the management which was responsible for analyzing and describing the qualifications required for the basis of a personal development plan.

Practically the same is true of UK1, in which continuing training is closely linked to necessary changes in the employer's policy. Its system for gathering information about future training needs is called "Top-down-Bottom-up", but this occurs only at different managerial levels and does not involve other employees.

We find that case study F2 embraces a participative concept of management, in which the shop managers get together as a work group and help an instructor to discern the concepts of new training programmes, identify needs, define content, design teaching methods and train all the people who will be responsible for the courses.

Quite a similar approach is to be found in the case of F6, a multinational super and hypermarket company:

"In order to ensure that operatives' training needs are consistent with the goals of the company plan, the content and organization of training courses are developed directly under the responsibility of the study groups involved. Thus, it is the national grocery study group, working with one member of the executive management and the head of training in the central office, that defines the contents of the

grocery department training and chooses the pilot department.

Such an approach clearly presumes a basic analysis of both training contents and the pedagogical tools used to present it. Such an exercise is difficult because it runs contrary to the oral tradition of the field. Through the study-group-system, however, each section head is involved in the conception of training, which ensures that the content is well suited to the operatives' training needs."

Management also plays an almost exclusive role in the definition of future training needs in the case of IRL3, which is described as follows:

"As a general rule training needs analysis within IRL3 is undertaken by the staff member's immediate superior. The process is informal, though the Training and Development Department are working on a pilot programme to make it more formalised.

The programme is in fact being piloted in the Training and Development Department itself and involves managers preparing individual training and development plans for each person in the department. The process asks staff members to highlight areas of weaknesses that could be overcome by training."

3. The third procedure that can be distinguished is to approach future training needs through interviews with management and staff at different levels and departments, as is done by the training department at E4 and, to a certain extent at IRL2, though here more faith is placed in the departments. In the case of F3, interviews to evaluate training needs are held exclusively with managers and supervisors.

4. A fourth approach to the definition of such needs is by way of annual interviews with all the staff, within a complex system of promotion through training, as is the case of UK2.

"Sales staff first carry out a self-appraisal and are interviewed by their manager; performance is considered under the headings of merchandising, customer service, security, administration, stockroom, and company policy and standards. There is also discussion of personal development and career development.

Branch managers' appraisal is carried out in discussion with area or regional managers. The managers themselves select their own key tasks which form the basis for discussion."

The other sources used for the analysis of future needs are managerial reports on the observation of and conversations with staff.

Cases UK5, IRL4 and F4 all belong to the same multinational which uses annual interviews with all employees, to discuss their development and training requirements, as one of the most important sources of information.

Annual interviews are also the most important source in the case of IRL1, but here they are combined with a survey of store managers concerning the most general training needs and the transfer of the most current, urgent objectives of managerial policy on training.

5. The fifth approach is "analysis in collaboration with external consultants", which we find in the case of UK6, B2 and others.

One of the most interesting cases of collaboration is B2, in which a profound revision of human resource policy has recently been undertaken, with immediate effects on continuing training:

"As the new general management of the chain grants very much importance to human resources, it immediately began to examine and adapt the global policy on personnel management. It gave rise to the creation of a bible of human resources: job descriptions, policy of salaries for each type of job, creation of assessment discussions (assessments of the performances according to three criterions: commercial abilities, human relations, integration in the company's spirit). This bible is not a final document, as it evolves with the needs of the life of the company...

The whole training programme is conceived and realized in collaboration with an external firm."

6. Case NL2 seems quite uncommon. After a crisis in the market, they decided to start up an extensive process of participative debate on all the areas that a study of the crisis had pinpointed as areas for improvement:

"The upshot of this was that it became clear that it was necessary to involve the employees more closely in the implementation of policy choices and also, that they must be given enough instruments to be able to work towards the realization of the proposed policy in a meaningful way.

Some 10 project groups were subsequently instituted. Within these groups, employees worked – and still work– on a sharper formulation of problems and on contributing ideas which will lead to solutions.

Since then, recommendations to change the way the work is organized and to give groups of employees courses providing additional and refresher training have issued from these project groups."

3.6.3 Training costs and evaluation[23]

It is difficult to even approximate the real costs of training on the basis of the data available. We have always insisted that the national research agencies should investigate the cost of continuing training as a percentage of the total wage package. Despite all our enquiries, the only information we were able to obtain was the following:

- About 33% of firms have no figures concerning costs.
- A further 30% provide a percentage of the total wage package, but since the distinction between initial and continuing training has caused many problems in the interviews, and many firms do not break their accounts down into the two types of training, we must assume that these figures usually refer to the general cost of all the training in which the firm is engaged. Furthermore, there is continuing training which the firms do not express as training costs, for instance "the thirty minutes per week" at the multinational F4.
- For the remaining cases, information about costs is available, sometimes calculated as an average per employee, or in some other way, but once more this information may not be accurate.

The greatest problem is knowing what a firm includes as costs (direct costs such as teachers, material, etc. or travel expenses, salaries of employees attending, the training structure itself?) With such inaccurate information it is impossible to make any valid analysis and thus the only conclusion to be drawn from the cases studied is that all of the companies have spent more on training in the last five years.

The lack of valid information and the difficulties in defining what is understood as training costs or investment, also indicate the process through which the sector is passing, heading towards a more active position in this field.

With regard to the financial assessment of training (cost/profit relation), the information available is even more scant and, when available, it only served to emphasize the nonexistence or impossibility of conducting such an analysis. The justification for the absence of such a financial assessment is that the profits of training in the retail trade can only be appreciated much later, or that it is impossible to know which factors have had the most direct influence on an upswing in sales.

3.7 Access to continuing training

Access to continuing training at the retail companies studied, presents a very diverse situation, arising both from the sector's own heterogeneity and its most recent changing trends in the training field. Whether voluntary, as described below, or compulsory, there are no records available to demonstrate that the firms have taken the specific needs expressed by employees in the largest categories (shop-assistants, cashiers, etc.) into account.

3.7.1 Continuing functional training

It has been observed that access to continuing training without promotion objectives, that is, as an improvement of professional ability, is mostly voluntary and involves 65% of sales staff. The acceptance or otherwise of a training offer made by different structures within the firm's organization (manager, personnel department, line manager, etc.), must also be understood as voluntary, and should simply involve the possibility of gaining access to an established programme responding to the individual needs of employees.

In half of the firms that establish a "voluntary" basis for access to continuing training without promotion objectives, access is only possible for those employees who have been shortlisted, nearly always the case with operative personnel.

This situation presents two issues: on the one hand, the voluntary nature of the offer becomes somewhat fictitious as:

> "Means of access is 'voluntary compulsion', as a rejection to an offer of participating in education is regarded as a negative signal to the manager." (DK2)

> "Non-participation may be seen as writing on the wall." (B1)

The second issue has to do with the growing decentralization of continuing training and the relevance of immediate superiors in a high percentage of cases concerning training.

This tendency towards decentralization is seen not only in the practice of training activities but also in the design of professional careers for the staff, since shop managers have great decision-making power.

The new, internal and increasingly decentralizing policy approaches and fosters the employee's interest in training, but has at the same time certain negative effects which are mentioned in the case studies. Here we refer both to the shortlisting process for possible candidates, for external activities, in which criteria other than training needs are considered, and the practice of training at the outlet itself.

In the process of shortlisting candidates for training, branch managers encounter difficulties owing to their own responsibility in the commercial and financial field and, on occasion, they deny or make access to training difficult for all or some of the employees, for example, those who make a great many sales.

[23] Eurostat is undertaking a survey concerning the training activities and costs in retail trade sector.

"There is a tension about taking individuals off the shop floor to undertake training. (...) The dedicated trainers believe that is most productive if ... they persuade the line managers by demonstrations of net benefits." (UK1)

"The major constraint is commercial pressure. There is a constant demand for the sales assistant to be on the floor-shop in a productive position." (UK5)

"The use of courses besides the internal in-store every month is very limited, as the store manager often rejects a request for attendance based on lack of relevance...; A conflict clearly exists between the bonus system on one side and the chain's policy of education on the other, reflected very clearly in the preference for the in-store training held by the store managers." (DK3)

The problem of sales commissions is also reflected in some of the companies with non-compulsory access, as they found some reluctance from the candidates when training activities were carried out during working hours:

"... the employees are beginning to appreciate training in a different way ... and some of them accept training in working hours, which implies a fall in the wages corresponding to bonus." (E5)

On other occasions, branch managers, usually senior and middle-aged employees, are reluctant about the idea of training because it is something they have never previously encountered in their professional lives. This type of attitude conditions the general training policy of the firm considerably. It is also apparent when training policy is the responsibility of the individual outlet.

"The offer of training is channelled through the establishment manager, who suggests the names of those employees suitable for training. (...) The middle management at sales points, mainly being older employees, have not assumed the responsibility of training." (E5)

"The effectiveness of the whole approach depends upon the motivation and competence of the branch manager. If he or she is enthusiastic about training and delivers it well in branches, all staff will benefit; but in the absence of such commitment staff are likely to suffer." (UK2)

There are some companies with open training programmes, to which all employees can have access and the only limitation is dictated by the amount of physical space available. One of the problems is, as we have already seen, the channelling of the supply and the informing of the staff, who may not receive it adequately.

"Employees are not always adequately informed about training provisions." (UK6)

But, in these firms too, the immediate superior directly participates in the process of communication, counselling, and acceptance of training demands.

In almost all the firms studied training activities take place during working hours, which makes attendance easy. Where this is not the case, training is paid as overtime (E1). However, there are also programmes conducted out of working hours (GR1, GR2).

Thirty-five per cent of the firms run their training activities on a compulsory attendance basis. Among them there are certain patterns to be observed.

Some, mainly those which have internalized continuing training without promotional objectives to as great an extent as possible, and regularly devote time to it (half an hour a week, one hour a month, etc.), such as UK5, F4 or DK3, have set up compulsory attendance, as training is usually given at times when there is no commercial activity.

In spite of this, and in order to diminish the effects of its compulsory nature, some of the firms mentioned above emphasize individual responsibility in the training process. And, apart from this compulsory space, which could be called communication rather than training, they offer a wide range of activities, access to which is achieved through "individual responsibility" (interest in making a professional career, in improving daily work, etc.).

Others, especially those which have a quality strategy or are immersed in projects for new concepts or segments of the market, also establish compulsory attendance at the sales position levels, such as NL2, E4 or B4.

Training in product-knowledge is generally compulsory in those companies in which it is put into practice, and which have a quality objective, mainly in the food sector. Companies such as F6, IRL1 and IRL2, or B2 stress product-knowledge as a weapon for a different type of marketing.

In those countries which receive funds from the European Community for continuing training in the sector, like Greece and Portugal, participants are selected from different categories by management. However, once they have been selected, attendance is obligatory.

3.7.2 Training for promotion

Although there is no systematic information provided about training for promotional objectives, it could be said that until very recently the general trend did not permit employees to make decisions concerning their professional careers, and only those selected by the management set out on the road to promotion.

However, in the sample we have seen a growing tendency (F1, E5, IRL2, UK2, D6, DK4) to open up promotion plans to middle sales posi-

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tions and branch managers. The lack of well-trained staff in such categories, owing to the firm's expansion or renewal, encourages the creation of promotion schemes which can be accessed from operative levels after an individual has chosen so to do, and after having gone through a series of knowledge, attitude, ability and psychological tests.

Training activities oriented towards promotion can be engaged in before or after being promoted. At all events, once promotion has been accepted, attendance to the activities is compulsory. The inclusion of an important block about human resources and training in the programmes oriented towards promotion, reveals the decentralization and relevance that these hierarchical levels are attaining in the training policy of companies.

Not all open programmes are a guarantee for immediate promotion after the selection and training process is over. It all depends on the needs of the firm. Despite this, in the cases studied, the possibility of taking part in an open programme leading to promotion fosters and develops the staff's interest in training.

> "Further to the direct benefits of the programme, its perceived success has enhanced the status of training within the store. A greater number of staff are now keen to participate in similar programmes." (IRL2)

In general, it could be established that if attending training sessions does not automatically generate promotion, non-attendance, in those cases in which attendance is voluntary, does seem to make the possibility of promotion more unlikely.

3.7.3 Company level and shop level.

There are several cases in our sample which illustrate the differences between company and shop levels, in terms of the development of training and access to it. UK1, UK5, DK3, E5 and D4 are among them.

In general terms, these are cases in which the reality of training activities and participation in training at a shop level are poorer than the concepts presented at a company level might suggest. Mention should be made of the most important reasons for this discrepancy.

There could be strong contradictions between training supply and the real opportunities for participation depending on the economic strategies employed by the head office. For instance, if part of wages depends on sales volume, or if there has been an important reduction in staff/customer ratios. This would mean that there was constant pressure on employees, a real obstacle to participation in training activities. So, it may be the case that while the training department at headquarters is becoming more and more aware of the importance of training and training approach design and content, the same does not occur at the shop level (e. g. D4.) There are also other reasons for which employees might not participate. In general, employees in the retail trade are quite young. There are, however, exceptions. Traditional enterprises of a family-owned, patriarchal type, where staff turnover is low and thus, most employees are older than is normally the case. With extensive working experience and a fairly good knowledge of the business, there is not a great demand for training, and sometimes employees express a fear "of returning to school".

Another reason in countries with a long established basic vocational education tradition in the retail trade, is that the renewal of qualifications is considered to be a question of generational change, and thus the shop manager who has to decide on employee access to continuing training might attach less importance to it.

If reductions in staff give rise to constant overtime work, as we saw in some cases, it also becomes an obstacle to participation in training.
Another important obstacle, of particular significance to promotional training activities is if, at a shop level, employees are not able to see any real advantage, such as career patterns or financial benefits.

Without forgetting the recent changes introduced in training policies in retailing, what can be observed is that commercial outlets, their managers and employees, are subject to personnel and commercial policies aimed at short-term profits which at times radically prevent the implementation of the training general firm management feels necessary for future objectives. The need to achieve certain sales figures with limited employees, in somewhat precarious conditions, provokes an explicit or implicit refusal of training schemes both by management and shopfloor employees, and consequently makes it impossible to implement such schemes.

In certain organizations, the greater the responsibility of shop managers (and employees) in the achievement of the desired economic results, the greater the difficulty encountered in obtaining access to training.

However, this contradiction could be avoided to a great extent if specific organization at the shop level [24] was taken into account when designing and implementing training. Theoretically, potential access to continuing training activities for all employees, the objective of many

[24] A recently completed study by "Sozialforschungsstelle Dortmund" shows that the question of new work organization at a shop level has only recently reached retail trade enterprises and many notable changes are already being made. Anita Flacke et al, Menschengerechte Arbeitsgestaltung im Einzelhandel unter dem Einfluss Neuer Technologien, Dortmund, October 1991

firms, is highly conditioned by factors such as the worker's working week, the shift system, the number of employees and customers per square metre, multiple tasks and substitution possibilities. Shop managers, ultimately responsible for deciding who will receive training, can be reluctant to provide access for individuals or groups, if it is to imply greater pressure on those left, or lower sales and worse customer service. Only by being familiar with the shop organization and needs, through communication and interaction between management and those departments responsible for the training policy, will it be possible to design a training model to which the highest possible number of employees can have real access. Some of the organizations included in this study have found satisfactory solutions, such as the department store multinational which operates in several of the member countries and opens half an hour later one day a week.

What is true is that where these conditioning factors are not taken into account, the training policy can be reduced to a series of statements of principle, activities and costs, which will not have any positive effect on the firm's profit accounts in the medium or long-term.

3.8. Types of retailing and continuing vocational training

3.8.1 Multinational/national companies

Fifteen of the 19 multinationals in the sample have been studied in their home country, and those belonging to the non-food sector predominate (11 as opposed to 8).

The non-food multinationals in the sample are represented by 10 medium-sized enterprises, ranging from 78 to 2,500 employees, and one large company with 12,000. Some belong to large multinational groups, such as the department stores UK5, F4 and IRL4 who, with the exception of the latter, all carry out their activities through a chain of outlets.

In most we can see the need to ensure or find their market position through product or customer segment specialization, requiring a higher degree of professionalism from sales assistants and not only from top or middle management positions. Thus, 9 out of 11 non-food firms provide their sales staff with continuing training.

The 8 multinational companies belonging to the food sector are large firms (7 of them total over 110,000 employees, the smallest has a staff of 400), and their commercial establishments are different types of super and hypermarkets. They maintain commercial policies of a more classical (based on expansion and prices) and functional nature, with a maximum extension of self-service. This obviously reflects on continuing training, almost exclusively addressed to managers and supervisors.

Despite this, an initial trend, observed in cases F6, B1, NL1 and B2, is coming to the fore in recent approaches to training. This is a consequence of the growing competition and the process towards different sales concepts, and leads us to believe that a possible gradual extension of continuing training to other categories is possible. This tendency is reflected both in the appearance of systematic continuing training and the content of training schemes (products).

> "In a very competitive market, the management considers that professionalism and the quality of relations will make the difference to keep the clientèle and face up to competition. It is in this perspective that the personnel training programme was designed" (B2).

B2 is the only multinational company of the 6 food firms in the total sample which provides its cashiers with training.

The training of part-timers in multinationals is a highly neglected area. Only 10% of part-timers receive training as opposed to 42% in the national firms.

Most of the 12 national food firms in the sample seem to have opted for the "post-self-service" sales concept, as a strategy against the greater resources of the multinationals. This is translated into the extension of continuing training to operative personnel. In the food sector, 83% of the training provided for cashiers corresponds to national companies. All of them provide their shop-assistants with continuing training, as opposed to only 25% in terms of the multinationals.

3.8.2 Food/non-food

In the sample there are 20 firms which basically sell food products. Of these, 9 are large distribution companies which have between 8,000 and 65,000 employees, 8 of them have between 1,500 and 3,500 employees, and the other three comprise two medium-sized enterprises (around 400 employees) and one small family business, specializing in health foods. Eight of the twenty firms are multinationals.

All the firms, with the exception of the small family businesses, develop their activities through supermarket chains of different types (hard discount, neighbourhood and quality shops, urban or peripheral) and hypermarkets, that is, all the establishments in which self-service is qualitatively important.

From early observation, two general policy guidelines can be seen in the food firms. Those which introduce the quality and service concepts in their marketing strategy, which we have called post-self-service concepts, and those which do not take them into account, at least explicitly.

Virtually all of them have promotional training schemes for managers and supervisors. Sixty-five percent of these firms provide their shop-assistants with continuing training (mainly in fresh-product or non-food product sections), and 30% of them make such provision for their cashiers.

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There are no truly significant differences in the target groups for continuing training between those firms in which quality is a distinctive element in the market and those for which it is not. Nevertheless, in the case of the former, continuing training for sales assistants is highly developed and implies a certain degree of specialization while in the latter, the training of managers and supervisors is a priority.

On the other hand, there is a characteristic common to 85% of the firms with customer service and quality policies incorporated in the content of training: the emphasis is placed on product training, both for middle management and sales assistants. To the contrary, the product as the subject of training is only visible in 38% of the programmes of food firms with more classical commercial policies, and with the exception of one multinational, even then it is given a secondary role.

In the other 62%, the content of training is mainly based on organization, management and computer applications for management, and on sales techniques for sales assistants.

Product knowledge is more intensively developed in the fresh product sector (fruit and vegetables, dairy products, butcher's/"charcuterie" products) and in bottled products such as wines.

All food firms, except for family businesses, have internal training structures available, mainly for operative personnel, but also for managers and supervisors. Twenty per cent of these firms have, in addition, schools with their own structure, exclusively devoted to staff training. There is no obvious direct relationship between the existence of a school and a specific training strategy or content.

In the sample the non-food sub-sector is represented by 27 firms of various types and sizes, which can be summarized as follows:

Size	no. of employees	Type
<100	5	Department and popular stores 11
100 to 500	9	Specialized chains (household & furniture, clothing & shoes, optical & photo, book & stationery) 13
501 to 1500	4	
1501 to 3500	3	
3501 to 8000	1	Specialized outlets 3
>8000	5	

With the firms in the non-food sector, continuing training for sales assistants is at a level of 89% and for cashiers, 22%. This is easily understandable considering the lower level of self-service and the existence of shop-assistants/cashiers.

There seems to be one difference to the food sector when we consider aspects of promotional training. The professional scale of the food sector and the large, predominantly self-service establishments, presents an important "gap" between cashiers and shelf-fillers (mainly operative categories) and supervisors and other middle positions, with regard to both the requirements of the workplace and employee qualifications. The same is not the case in the non-food sector (nor in the sections specializing in fresh products, in certain food establishments), where a shop assistant can have far more contact with more complex and varied tasks during the course of a working day. This, together with a somewhat superior level of initial education – due to the wider extension of customer service – could explain the existence of several firms (E5, IRL2, UK2) in the sector with promotional schemes open to intermediate categories. This situation is virtually inexistent in the food sector, where in most cases companies have to turn to the external market to cover middle positions or train the employees who have already been shortlisted, chosen and monitored by the firms themselves.

This gap in the professional scale may also be the explanation for the existence of the large number of schools in the food sector and the low number in the non-food sector. In contrast with the 20% of food sector firms with schools, only 11% have them in the non-food retail sector. This difference has nothing to do with size, although one could be led to believe otherwise. Out of all the non-food firms with schools, 66% are of under 500 employees.

Learning, both functionally and promotionally, seems to be more comprehensive and efficient in those establishments with sales formulae in which consumer attention and service (and product quality) are present, taking the following structure into account: schools in the food sector (supermarkets and hypermarkets) and open promotional schemes in non-food establishments.

In the non-food sector we find most of the training action for sales assistants qualified as being "short lasting and at the employee's own workplace" courses, which means they take place regularly, at fixed times (15 or 30 minutes per week, one hour per month, etc.). However, the most common type ranges from half a day to two days. The Portuguese, Greek and Spanish firms with training schemes for operative personnel are special cases. These schemes are financed by the EC and last far longer (from 200 to 300 hours), as is also the case in the food sector.

3.8.3 Different types of non-food establishments

With regard to the different types of establishment in the sector, there are differences in the target groups for continuing training. Although all firms have schemes for middle and top management, department stores, mainly those addressed to a medium/high segment of the mar-

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ket, are those which are developing plans and programmes for sales assistants, in the same way as the specialist outlets in the sample are doing.

In the firms with distribution chains, the situation is not so homogeneous, and commercial policies and sales concepts play a role in the definition of target groups, to such an extent that we find some shop chains where sales assistants are not provided with any, or receive very little, continuing training, and others with more systematic, more continuing planning. The latter is generally the case in the firms addressed to high segments of the market, or with a tendency towards it, but can also be seen in some more popular outlets with strong competition.

Training for cashiers, which is provided in 22% of the firms, is following the same path as training for sales assistants.

3.8.4 Size

As far as our sample is concerned, the size of a firm does not seem to have a determinant effect on the policy and implementation of continuing training. However, it must be remembered that only a very limited proportion of small enterprises offer vocational training[25]. In general, size seems to have a certain influence on which enterprises will be disposed and able to offer continuing vocational training to their staff. On the other hand, the case studies clearly show that once it has been decided to offer vocational training, small enterprises are able to do it as well as larger ones, but making a great organizational and financial effort, given the difficulties SME's are faced with. Factors such as sales concepts, or the sector, are far more definitive ones. In the sample we find that the smaller, specialist businesses, devote their efforts, time and resources to providing all their employees with continuing training, even part-timers, because their policy depends on goals which require well-trained staff, and they make use of internal and external instruments to achieve them (UK3 and UK4). We have also found that many companies with a higher number of employees are now initiating continuing training practices. This is why they need external help from the sector, associations, etc., as they themselves do not have sufficient resources to take such a step forwards, as can be seen so clearly in the case of the SME's.

With regard to implementation, both large and small companies may make use of external instruments, although the latter use them for their operative personnel and, if at all, the former use them for managers.

[25] With regard to the attitude of entrepreneurs in small businesses towards training activities, see the recent Dutch study about the subject, conducted by Harry Van den Tillaart, ITS, Nijmegen, 1991.

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TRENDS

PART 3:

4. CONCLUSIONS

4.1 Summary of findings

4.2 Key issues

STATISTICAL ANNEX

OTHER ANNEXES

4. CONCLUSIONS

4.1 Summary of findings

The following summary of findings was drawn from the general description included in part I and from the analysis of the case studies in part II. Putting them together underlines the difference between some of the more advanced experiences and the average situation in each European country and suggests possible future directions.

The case studies were selected, after a consultation with social partners at the national level, with a view to identifying some of the most meaningful experiences, but also to take into account the diversity of forms of trade and of size of enterprises.

In order to better understand the value and the meaning of the case studies, it was deemed necessary to consider them against the background of the national contexts, i. e. of the situation and evolution of the retail trade sector. The first part of the report deals therefore with the structure of retailing in the different countries, the observed trends and future prospects; it includes an analysis of employment, skills and labour force issues. The second part summarizes the findings of the case studies concerning more specifically continuing training.

Reviewing the sample at the completion of the study, we find that small firms are scarcely represented. On the other hand, we find that the top segment of the trade is over-represented, that is, the segment that caters to the most demanding consumers, those with the greatest purchasing power. The reader will have to bear this fact in mind for the interpretation of the results.

The general economic situation, which has changed during the course of the survey, has presented further difficulties. At the beginning of the empirical stage of the survey we found competition to be fiercer but there was not a general feeling of concern for the future. Today, the retail sector is faced with a fairly generalized crisis which has and is affecting consumer behaviour. The cause of this has to be found in the repercussions on the sector of the general stagnation of economy at European level and on the internal restructuring of the sector itself, in which some countries are more deeply immersed than the others. It is possible that the current situation will limit the extent and pace of the changes observed, but, at this point, it seems that it is not likely to bring about changes in the direction of the main trends observed.

4.1.1 The retail sector: present situation, trends and prospects

An analysis of country reports and of the documentation available on the modern development of organizational structures of retail trade suggests that it has roughly followed four stages:

- stage one corresponds to the emergence of the department store (in the late XIXth century);
- stage two can be identified with the development of multiples or chainstores and of cooperatives (around the turn of this century);
- stage three corresponds to the fast expansion of self-service stores (supermarkets and hypermarkets) selling at low prices and usually located in suburban areas. It was initiated in the 50's in Europe and is still going on in many countries;
- stage four can be seen as a time of diversification of structures, of products and of commercial strategies (with more specialization by products and segments of customers and a new emphasis on quality and on service). It is emerging today.

In relation to a variety of geographic, economic, cultural and institutional factors, European countries are in a different position today with regard to these stages: some of them are just entering stage three, while others already belong to stage four. In any case, each country maintains its specificity, but this suggests an overall trend which has important implications for this report: stage three has been usually associated with concentration and a reduction of the number of outlets, going together with increased productivity. It usually had negative effects on employment. Generally speaking, the occupational structure in the retail sector and therefore the kind of training needs depend heavily upon the predominant forms of commerce.

This being said, all EEC countries are likely to be affected in the future by the same factors: an aging population, more diversified and demanding customers, increased competition and internationalization (in relation to the emergence of the single market) and the more widespread use of information technologies. How internal organizations will be adapted to meet these changes is largely left to the policies adopted by retail companies.

4.1.2 Employment and the labour force

European countries as a whole have recorded during the last decades a slow growth of employment in retail trade despite the productivity gains. This means that the number of jobs created by the expansion of the sector has been superior to those destroyed because of the growth of productivity in the enterprises. It has concerned mostly the non-food business, as a result of a growing consumption and of the persistence of a large number of small shops.

In general terms part-time work has grown, while concentration has entailed a substantial reduction of the number of independent workers.

Despite the variety of national conditions, EEC countries share a number of other well-known characteristics of retail employment. They include: the large proportion of women and of youth in the labour force, a high rate of turnover (at least in the majority of countries and with

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interesting exceptions in some of the case studies) and a frequency of seasonal jobs and temporary contracts.

These features are likely to be affected by the structural, economic and technological changes mentioned above. Part of the simple and repetitive tasks may be automated or become redundant. Competition requires a more efficient management. The new emphasis on quality and service would normally require a more competent and more motivated staff. In other words, a shift towards stage four would mean a trend towards upgraded skills and more emphasis on the quality of labour.

4.1.3 Training and recruitment

The variety of education and training systems in Europe is well-known. But the report underlines that, with the exception of managers and of countries like Germany and Denmark where the dual system of apprenticeship provides a good proportion of well-trained staff, the educational attainment of the workforce is comparatively low in most cases and in many countries.

The small number of intermediate jobs has been observed more particularly with large self-service companies of the food sector and may be associated with stage three. This could render promotion and career prospects more difficult. Women are particularly affected, as they fill most of the part-time jobs and are not occupying middle management or management positions but for a reduced number.

As will appear in the second part of the report, which deals more specifically with continuing training, the analysis of case studies has often confirmed and sometimes qualified these general observations.

4.1.4 Business strategies and training objectives

Case studies have indeed confirmed the emergence of a new stage. In a number of firms, it could be defined as a post-self-service era, combining as far as possible the advantages of self-service (for the customer and the firm) and of personal service (for the customer). This has clear implications for training, the function of which is quite different according to the concept of selling and to the product sold.

In a number of retail firms surveyed, the business strategy had recently changed, either towards a higher quality of product and service, or towards different groups of customers, or towards creating a new image. This has gone mostly together with a new emphasis on the education and training of the staff, especially of shop assistants. This type of training includes together an appropriate knowledge of the products and the attitudes and behaviour which are consistent with the image that the company would like to enhance.

From our observation, it could be said that the more advanced firms in the survey, alhough few in number, have taken steps to integrate training into their overall strategies and that they take a more global view of human resources development.

This explains why in many cases, a major training objective has been the adjustment to the new commercial policies and the promotion of the new image of the company. But this is a recent development and it should not hide the fact that, up to now, the priority has been given to the training of newly recruited employees and more particularly of potential managers.

4.1.5 Planning and organization of training

Approximately half of the companies surveyed reported that training needs and objectives were translated in terms of a plan. Training needs are assessed in a wide variety of ways, especially with regard to the degree of participation of unions' and employees' representatives. In many instances, it is very limited and needs are assessed essentially by management. In some cases a central department may simply collect the suggestions made by managers at the local level. In some other cases it may conduct a specific study throughout the company. In others a task force may be set up with representatives from the different units.

There are also other patterns based on study groups set up in different areas, which have to ensure that training needs are consistent with the goals of the company plan and that the training content is well-suited to the operatives' needs. Identification of needs may go together, in some cases, with the formalization of procedures and practices and with the formulation and updating of job descriptions. For instance, this process may involve a number of specialists and of supervisors from the stores. In other instances, training needs are assessed at annual individual interviews with all staff members. In still others, needs are assessed by an overall revision of personnel management policy with the help of individual consultants.

The new emphasis on training necessarily requires a new organization. It is worth underlining that a number of the firms surveyed had no training organization at all until recently, when new measures were taken to set up training departments and training centres, to define plans and objectives and to develop curricula. The survey shows that in 70% of the cases reviewed there were thorough organizational changes during the last seven years, many of them during the last two years. 88% of the companies had a training department in 1985.

A significant and widespread trend concerns the tendency to internalize training, which is now the responsibility of the company itself, rather than of outside firms or training centres. This trend is less remarkable in the countries with a dual training system. This is consistent with the will to relate training with the company's strategy

and with the image that it wants to enhance. One aspect of internalization is the creation of internal training institutes or universities offering a range of programmes to the staff of the company (or of the network of small shops). Another one is the new role assigned to managers and supervisors in the delivery of training: a role which requires an appropriate training and which may be conflicting with their other duties. Internalization of training programes runs the risk of becoming too specific to meet the broader needs of both the employers and employees.

Internalization may well go together with a fair amount of decentralization of training responsibilities at the regional or store level, where there may be a training supervisor. At the local level, training needs are identified and the delivery is planned and implemented, while the central level is responsible for the preparation of contents and of teaching materials. With the delegation of authority for training to the local managers there may, however, be some conflicts of priority with more short-term economic objectives.

The participation of unions' and employees' representatives in the planning of training and in the control of training expenditure is the object of legal provisions in several countries. They obviously play a more active role in the area of initial training, particularly when there is no specific training for retailing ; there are instances of joint initiatives by social partners to create or improve training programmes.

With regard to continuing training, the situation looks somewhat different: although interest for the subject seems to be constantly growing and it has been, until now, a less conflicting area, unions' and employees' representatives are usually not directly involved (at least at the outlet level) in the planning and programming.

4.1.6 Target groups and access to training

Although their relative share is constantly decreasing, independent workers still represent 20 to 30% of employment in retail trade (80% in Greece). Nevertheless, they have traditionally had little participation in training activities. But this is beginning to change, particularly when they belong to voluntary chains: in this case, the training of owner-members has become one of the strategic, key questions for the future. Training is seen as an important factor of group cohesion. It may be a means to achieve more homogeneity and efficiency, through joint definition and application of homogeneous procedures, organization principles, selling concepts and management methods. Nevertheless, problems remain as many owners of small shops feel that they cannot spare any time for training or do not see the need to be trained.

In larger firms, it is for shop assistants (salespersons) that training opportunities are more common (in 80% of the case studies), particularly in food shops, but to a lesser extent in super/hypermarkets, where they are a minority. So far cashiers have received lesser training and stockroom clerks would seem to be the category most frequently left out of any type of training.

The new emphasis on training as part of a global commercial strategy implies normally more attention for the training of all employees. Thus, several companies are expressing a new concern for the training of part-time staff, who bear great pressure and are in direct contact with customers at critical moments. There are two instances of courses designed specifically for ethnic minorities or for "multicultural management".

The report describes several programmes designed to encourage women's promotion and to assist women in identifying and developing their own abilities, personality characteristics and occupational interests, so that they can optimize their career potential. There are also a few examples of training sessions for cashiers and checkpoint clerks.

The survey does not make it possible to quantify these findings and to estimate the impact of training in terms of numbers of people trained.

Access to training is often voluntary, but the identification of potential trainees is in most cases the reponsibility of management. The new approach aiming at the training of the whole staff involves de facto an obligation to participate. In several instances, it is reported that there is some reluctance on the part of supervisors to send their employees for training (commercial pressure, lack of interest), but also sometimes on the part of employees themselves (for instance, possible loss of bonus for salespersons).

4.1.7 Contents and methods

Curricula are usually conceived in a modular way. Particularly for sales personnel, and also for their supervisors, training contents are meeting the new realities of the market, usually with special emphasis on products and on sales techniques based on the concepts of customer service and attention. They are also responding to the firms' particular needs related to changing policies and organizational restructuring.

An increase in training of sales staff on the company's cultural and organizational features has also been noted. Some firms are extending their training to more general subjects, such as costs, margins and so on. Two firms in the sample had included in their programmes ecological and environmental issues.

It is interesting to observe that, if technology plays an increasing role in the competitiveness and management of retail companies, its place is extremely limited in training programmes. This is because the daily utilization of information systems has become quite simple. Only a few

managers or supervisors require a specific training for the adaptation of standard software. The impact of information technologies is more indirect : they imply a more sophisticated and more rigorous organization which can work only with competent people having a broader understanding of their work environment.

Decentralization often implies that detailed plans and teaching aids are prepared by the training departments to be used by managers and supervisors at the local level. It is attempted to set up a multiplier system whereby each level of the hierarchy trains the lower one.

Pedagogical methods are following the general trend in training. The cultural context contributes to the fact that the staff is essentially motivated for a concrete approach of their daily problems and not for an academic one. This explains why there is little classroom and face-to-face training and much on-the-job training. Five types of pedagogical methods have been identified:

- self-learning, through correspondence courses, textbooks or audio-visual materials ;
- simulation of situations in the workplace ;
- business games (three firms in the survey) ;
- sandwich courses, with longer periods of practical experience with the help of tutors. They are particularly common for the training of supervisors ;
- short meetings to discuss common interest matters in the work environment. An interesting experience is the practice of delaying the opening of the store for half an hour every week and of providing a training and information session intended for all the staff during this period.

4.1.8 Cost and efficiency

Case studies brought only scarce information on the cost of training. About one third of the firms surveyed had no information available. Data collected in the others are incomplete: some of them relate the expenditure to the amount of wages, others to the sales, others to the number of employees.

It is only in France that, as a result of the legislation on the contribution of companies to the training personnel, statistics are available at the national level as well as in the firms surveyed. The main findings are: expenditure on training in the retail sector is much lower than the national average; it is higher in the larger firms than in the smaller ones; it has been increasing during the recent years; it is higher among the companies surveyed than in the sector as a whole. The national reports indicate that these findings could apply to most other European countries.

The question concerning the evaluation of the economic returns and more generally of the results of training did not bring any satisfactory answer. Most of the firms had nothing to say about it. Only a few could refer to the evaluation of the training courses by the students themselves, or to the relationship with the final assignment or the promotion of trainees. One of them indicated that it was giving due consideration to this complex problem, which has to be seen essentially in a global and indirect way.

4.2 Key issues

The overall conclusion which might be drawn from this study is that there is still a lot to be done for the collection of systematic factual data on training. This could not be achieved with the comparatively small sample surveyed and it is the objective of the future EEC statistical survey. But the particular context of the retail sector and especially the informal nature of much of the training activites will demand specific actions to be taken.

Two future trends are revealed by the survey. The growth, a recent development in many instances, of the number of training activities in the firms within the sector, and the change to a more strategical role of training within the firm's human resources policy.

Both trends are in line with the new conditions of competitiveness in the sector and with the evolution of the firms' market strategies. The segmentation of customers, the improvement in the quality of customer service are two important factors which generate new needs and new training policies in the firm. Simultaneously, cultural changes between employers and employees, which confer a rising relevance to continuing training, also act as stimuli for the development of training activities.

Employment conditions, such as working hours, low wages, staff turnover, employment stability and career prospects are factors which influence the implementation of training programmes.

If we bear in mind the new demographic trends, a shortage of labour available for retailing is likely to exist in the future, and it has already been detected, at least for management and skilled jobs. If the retail trade sector wants to remain attractive to the skilled workforce in the next few years, it will have to enhance its image by providing wider possibilities of training and a professional career and by improving its working conditions so that the expectations generated with regard to continuing training do not change to frustration, which would increase in turn the staff turnover.

In a strategy of competitiveness and quality, shop assistants have become a strategically important group in the transfer of the sales concept to customers through their own behaviour and knowledge. This requires the involvement of all the staff in training activities, which means that the sector will have to improve the attention devoted to segments of staff which have traditionally received

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less training: owners of small shops and their employees, part-timers, employees with a lower level of qualifications and female staff.
In spite of the similarity of problems faced by the firms, the various situations within Europe are the reason why the solutions adopted may vary from one country to the other depending on its commercial structures, workforce characteristics, national policies and socio-cultural traditions. The study found a number of cases where the national situation is different from the overall view summarized above:

- the role of cultural factors in the predominance of small family-owned shops in Greece;
- a fast increase of multinational firms in Portugal;
- a high degree of innovation and of sophistication in the Irish case studies;
- a comparatively higher level of education and of concern for education in Denmark;
- the new importance attached to training and to the definition of national vocational qualifications, including recognized standards in the United Kingdom;
- more serious problems for the recruitment of skilled personnel in Germany, the Netherlands and Belgium;
- a particular opening towards neighbouring countries in Luxemburg;
- an important role of the State in the definition of rules and of orientations and in its contribution to the financing of training in France;
- the most extreme example of a drastic and overall process of change in the Eastern Länder of Germany.

Despite each country's specific features, training activities within the firms can be classified in three current trends:

- those grounded on initial training as the main qualification strategy in the management of human resources. This policy is in a more advanced phase in those countries with a highly developed system of sectoral training, or with dual training systems, in which the firm takes an active part in the provision of initial training by adapting it to their specific needs, as it happens mainly in Germany and Denmark.
- those grounded on the collaboration between firms, may it be helped by the associations or organizations existing in the sector, or by the networks for co-operation between firms through purchase associations or franchise. This policy is more widely extended among the most dynamic sectors of small enterprises, and would undoubtedly be appropriate for those countries with an important proportion of firms of that size.
- those grounded on the internalization of training activities. This is more in line with the policy of large firms which have the necessary resources to organize their own training activities, mostly among those firms which have chosen a strategy of high segments of the market, with a view to reducing the high costs of external training and in order to better adapt training to the firm's general policy.

From the previous policies, some questions especially relevant to the future of training in the sector can be concluded. In the first place, and with the exception of the countries immersed in the first trend, gaps exist in the interrelation between continuing training in the firms and the existing systems of initial training which ought to be reduced.

Secondly, the importance of fostering partnership between small enterprises so as to develop a supply of training adapted to their needs seems to be much more urgent than in the past, due to the competitiveness which these firms have to cope with.

In the third place, the internalization of training in large firms is an indicator of the deeply-felt role of training as part of the employers' strategy. Nevertheless, although this is not so as a principle, the danger exists that there will be an undue adaptation to the most immediate needs, seen as an alternative to a basic qualifying training, which may be harmful for the firms' capacity of adaptation to the changing market as well as for the professional interests of the employees themselves.

The difficulties met in defining continuing training activities could justify more thinking about the specific nature of training needs for the retail sector. Some of them appear as very general (behavioural skills and a broad understanding of the principles of commerce and management).

Others are very specific and require only short and informal sessions (products, image of the company), which poses the problem of certification of the training activities. Undue focus on too specific programmes, and too short sessions, would be contrary to the recommendations of the European memorandum on vocational training, issued by social partners in the retail trade, and the call for minimum training standards included in the memorandum seems to be appropriate in this respect.

The improvement of the contents of training and a more extensive participation of unions' and employees' representatives, in accordance with national law and practice, in the definition of training activities is advantageous and shoud be encouraged in order to increase the effectiveness of the training provided.

The findings of the national reports have revealed a higher level of participation of unions'

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and employees' representatives in the design of training at institutional level, and more generally in the field of initial training, than at company level. Taking into account national circumstances and company characteristics, a more extensive participation would favour the implementation, at company level, of the general continuing training policies in the different countries.

The sector's social partners have shown a great capacity for social dialogue at European level, which has resulted in the passing of an important document in the field of training, the "Memorandum on Training in the Retail Trade" (October 1988). This document focuses on the most serious concerns with regard to training in the sector and underlines those elements which hold a greater interest for both sides. The ideas suggested in the document may be the basis for European action concerning training in the sector, and they are founded on some general policies: the promotion of training activities especially among small and medium-sized enterprises, the effective access of all categories of employees to training resources, the improvement in the quality of training activities and the fostering of transferability of successful experiences among the different countries and regions.

This survey has highlighted the need to place training in the context of a broader human resources policy. Transferability of this approach and these experiences should of course take into account national differences, but also the differences between individual firms. In this respect, the type of commerce and the selling concept may appear even more important than the size, at least for the medium and large companies, the smaller individual shops representing obviously a specific situation.

It is hoped that this study may contribute to the transfer of approaches and experiences. First of all, it identifies new directions and provides a better understanding of the transformation of the sector. It should contribute to a new awareness of the importance of training and to the promotion of a training culture. Secondly, it gives a number of concrete examples of training activities, with their contextual preconditions. Finally, it could be used as a basic document to develop exchanges of views and of experiences and to define criteria for the promotion of training activities.

The final consideration to be concluded in the light of the findings of the survey is that, as the sector is facing some uncertainty in consumers' behaviour and also the growth of international competitiveness, the development of new management policies of human resources which favour a greater productivity appears as an indispensable condition. On-the-job continuing training activities must be developed in that context, by contributing the permanent updating of the employees' qualifications. The interrelation of training schemes with the policies geared to improving employment quality in the sector will enable the firms to achieve better returns in the management of their human resources. The implementation of some kind of European action, deeply integrated at company and local levels, which favours that interrelation, may contribute to this.

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STATISTICAL ANNEX

3.

In this report, statistics have been used to illustrate the problems and to give an idea of their magnitude. However, they are not the main object of the study. Solving the manifold problems of comparability would be beyond its scope. Other programmes are already involved in this, particularly Eurostat and we have referred to its material and, of course, the national reports. But sometimes it is hard to combine the sources, as definitions and scope differ: the Eurostat study is based on a restricted definition of retail (without motor trade and petrol stations) as is the case for most – but not all – country reports, while the Workforce survey concerns the broader (2 digit) definition.

The definition adopted by this study is only in use in Belgium (but not by the joint committees concerned with labour conditions and salaries) and in Portugal. Many countries include motor vehicles and petrol filling stations in their definition of retail trade (D, DK, E, GR, L, UK). The same is true of the Central Industrial Board for retail trade in the Netherlands, which excludes dispensing chemists. The Central Bureau of Statistics, however, uses a wider definition. Ireland also includes public houses, but excludes markets and mobile shops. France excludes bakeries and patisseries (which are supposed to be part of the food-processing industry). Italy does the same, but includes sales of vehicles and filling stations.

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3.

Table 1 – Table EUR1a: Importance of commerce[a] in the EC absolute values (1987-91)

Absolute values: number of enterprises, employment, turnover

Number of enterprises (1000)

	Wholesale	Retail	Total	Year
B	48.0	127.8	175.8	1990
DK	35.8	48.1	83.9	1990
D	189.7	439.0[c]	628.7	1990
GR	28.0	175.0[d]	203.0	1988
E	46.3	454.9	501.2	1988
F	132.4	461.8	594.2	1990
IRL	3.5	29.3	32.8	1988
I	192.6[f]	929.7	1 122.3	1989
L	1.9	3.5	5.4	1989
NL	71.9	95.0	166.9	1990
P	31.3	173.3	204.6	1988
UK	142.7	348.2[c]	490.9	1991
EUR12	924.1	3 285.6	4 209.7	1988-91
USA	469.5[g]	1 503.6[g]	1 073.1[g]	1987
JAP	436.4	1 619.8	2 056.2	1988
EFTA	–	196.0	–	–

Persons employed (1000)

	Wholesale	Retail	Total	Year
B	201.8	274.7	476.5	1990
DK	166.2	199.7	365.9	1990
D	1 375.0	2 353.0	3 728.0	1990
GR	115.4	338.2	453.6	1988
E	450.0	1 434.0	1 884.0	1988
F	1 049.0	2 090.0	3 139.0	1989
IRL	40.4	131.4	171.8	1988
I	1 084.0	2 401.0	3 485.0	1990
L	10.8	18.1	28.9	1989
NL	360.0	637.5	997.5	1990
P	200.0	336.3	566.3	1987
UK	921.0	3 030.0	3 951.0	1991
EUR12	5 973.6	13 273.9	19 247.5	1987-91
USA	4 578.0	19 085.0	23 663.0	1988
JAP	4 332.0	6 851.0	11 183.0	1988
EFTA	–	1 239.5	–	–

Turnover[b] (bn ECU)

	Wholesale	Retail	Year
B	85.0	35.0	1990
DK	60.0	24.0	1990
D	523.0	322.0	1990
GR	–	20.0[e]	1990
E	69.0	85.0	1988
F	312.0	260.0	1990
IRL	12.0	11.0	1988
I	–	230.0[e]	1990
L	5.0	3.0	1989
NL	135.0	45.0	1990
P	–	20.0[e]	1990
UK	310.0	280.0	1989
EUR 12	–	1 335.0	1988-90
USA	1 260.0	1 350.0	1990
JAP	2 651.0	682.0	1988
EFTA	–	170.0	–

[a] Including motor trades
[b] Turnover figures include the motor trades and exclusive VAT
[c] Official figures were increased by 10% to take account of the smallest enterprise
[d] Eurostat estimates based on number of local outlets
[e] Eurostat estimates
[f] 1981 figure minus 5%
[g] Number of establishments

Sources: Eurostat national statistical offices (NSQs)

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Table 2 – Table EUR6: Contrasting structures within the EC retail sector (1988-90)

	No. of enterprises	No. of enterprises per 10 000 inhabitants	Persons employed per enterprise	Share of sole proprietorships (%)
1. Countries with high enterprise density				
P	173 300	175	2.1	–
GR	175 000	174	1.9	80.1
I	929 700	161	2.6	90.4 [a]
B	127 800	128	2.1	74.5
E	454 850	117	3.2	92.0
2. Countries with low enterprise density				
DK	48 100	94	4.2	76.6
L	3 520	93	5.1	62.5
IRL	29 300	84	4.5	71.0
F	461 800	82	4.5	71.8
D [b]	439 000	70	5.4	81.5
NL	95 000	64	6.7	70.1
UK [b]	348 200	61	8.7	–
EUR12	3 285 570	96	4.0	–

[a] 1981 figures.
[b] See note b in Table EUR1a.

Sources: NSOs and Eurostat estimates.

Table 3 – Table EUR11: Characteristics of retail turnover in the EC [a] (1990)

	Turnover (bn ECU)	Turnover per enterprise (1 000 ECU)	Turnover per person engaged (1 000 ECU)
D	322	813	125
UK	280	804	92
F	260	563	124
I	230	246	96
E	85	187	64
NL	45	446	87
B	35	273	98
DK	24	499	120
P	20	116	44
GR	20	114	59
IRL	11	375	84
L	3	800	150
EUR12	1 335	406	100

[a] Countries grouped according to total retail turnover.

Sources: Eurostat estimates, NSO statistics.

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Table 4 – EUR8: Number of retail outlets in the EC (1986-90)

	Year	Total	Food Number	Non-food Number	Outlet density per 10 000 inhabitants
1. Countries with a high outlet density					
P [a]	1988	190 000	92 400	100 200	192
GR	1988	184 900	54 550	116 300	184
I	1990	983 000	337 200	577 800	171
B [a]	1990	140 000	–	–	141
E	1988	523 150	200 330	302 655	134
L	1989	4 400	–	–	116
2. Countries wiht a low outlet density					
DK	1990	51 500	15 000	30 000	100
F	1986	546 150	156 057	314 770	97
IRL	1988	31 700	16 550	11 320	90
D [b]	1987	553 660	145 500	315 100	85
UK [a]	1990	466 700	98 950	290 750	81
NL	1990	119 400	31 700	71 000	80
EUR12	1986-90	3 774 560	1 155 790 [c]	2 101 895 [c]	107

[a] Eurostat estimates
[b] West Germany
[c] EUR10

Source: Eurostat based on official national statistics

Table 5 – Table EUR9: Employment characteristics in EC retailing [a] (1987-91)

	Total retail employment	Wage and salary earners (%)	Female employment (%)	Part-time employment (%)
1. Countries with a low share of employees and female employment				
GR	338.2	28.9	43.6	3.3
I	2 401.0	38.7 [b]	–	–
P	366.3	46.8	45.6	5.3
E	1 434.0	46.6	53.7	6.4
B	274.7	52.4	52.8	17.4
2. Countries with a high share of employees and female employment				
IRL	131.4	70.2	45.6	13.4
F	2 090.0	74.1	50.3	25.3 [c]
NL	637.5	79.1	56.7	47.3
L	18.1	80.6	51.6	11.5
DK	199.7	84.0	52.8 [d]	38.3 [d]
UK	3 030.0	84.2	58.1	40.7
D	2 353.0	84.6	64.1	37.3 [e]
EUR12	13 273.9	66.0	57.1 [f]	24.2 [f]

[a] Countries grouped according to importance of wage and salary earners and female employment
[b] Including wholesale trade
[c] Insee, annual enterprise survey in distributive trade
[d] Danmarks Statistik
[e] Statistiches Bundesamt, Arbeitsstattenzahlung 1987
[f] EUR11

Source: Eurostat, labour force survey

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Table 6 – Table EUR10: Break-down of retail employment (in %) by main kind of activity [a] in the EC (1987-90)

	Year	Food	Textiles Clothing	Household equipment	Motor trades	Other	Total
IRL	1988	52.5 [c]	10.0	6.1	12.8	18.6	100.0
P	1987	39.7	14.7	15.1	11.0	19.5	100.0
UK	1989	38.7	10.0	11.0	18.7	21.6	100.0
E [b]	1988	39.3	17.5	14.2	9.8	19.2	100.0
DK	1990	39.2	12.0	11.0	17.7	20.1	100.0
I	1981	38.5	18.5	11.7	8.7	22.6	100.0
B	1990	36.4	17.2	10.5	5.8	30.1	100.0
NL	1990	36.4	14.9	11.0	14.0	23.7	100.0
F	1989	33.3	13.7	11.5	19.4	22.1	100.0
GR	1988	31.0	20.2	15.0	8.4	26.4	100.0
L	1989	30.6	18.1	14.7	20.8	15.8	100.0
D	1990	27.5	18.6	11.5	10.1	32.3	100.0

[a] Countries grouped according to the share of persons employed in food retailing.
[b] For Spain: including department stores.
[c] Including public houses.

Source: Eurostat, based on national statistics.

Table 7 – Table EUR13: Change in EC retail sales [a] (1985-91)

	Food	Textiles-Clothing	Household equipment	Total
B [b]	108.1	114.2	127.8	117.2
DK	106.6	84.0	–	102.0
D	121.9	117.8	138.9	129.1
GR [b]	144.3	85.2	126.9	109.3
E	–	–	–	–
F [b]	119.4	101.8	124.1	116.9
IRL	105.4	114.0	116.4	107.5 [b]
I	–	–	–	–
Lb	121.6	107.4	115.8	111.2
NL	111.8 [b]	–	132.6	120.1
P	–	–	–	–
UK	119.3	117.0	136.0	119.4
EUR9	119.2 [b]	–	–	119.4 [b]
USA		–	–	109.8
JAP		–	–	125.6 [b]

[a] At constant prices (1985 = 100).
[b] 1990 figures.

Source: Eurostat.

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OTHER ANNEXES

3.

Joint opinion to the FORCE committee on the FORCE survey on continuing vocational training in the retail sector from the european social partners for commerce.

EURO-FIET and the EUROCOMMERCE representing employees and employers in the European commerce sector welcome and appreciate the survey on training in the retail sector, which comprises 14% of the EC workforce, carried out by the Commission under the auspices of the Community's FORCE programme.

They underline the value of the methodology used in carrying out the survey the survey which involved the social partners at all levels and stages.

As the first sectoral survey to be completed since the FORCE programme was adopted in 1990, it has particular significance for future surveys and the development of European Community training initiatives.

Training has to be considered in relation to the European and national social and economic context, the company structure, the composition of the staff, the type of contract offered and the needs of employers and employees. A sectoral approach is necessary to place training needs in the overall context of employment conditions and perspectives.

This means that the appropriate social partners need to be consulted at national level in accordance with national laws and/or practices and at the European level in the development and implementation of training initiatives.
The proposed national round tables will provide an opportunity for further discussion of the national and European reports in detail.

The survey of the 55 case studies and national reports clearly indicates the need to fully apply the principles contained in the joint EURO-FIET/CECD memorandum on training in the retail sector.

Applying these principles in practice at national level and European level and securing a well-skilled workforce able to meet the challenge of future developments in the commerce sector remains a top priority for both EURO-FIET and EUROCOMMERCE.

The survey also indicates that there is a need for cooperation between Member States in order to exchange experience on and improve understanding of the different existing systems in Member States.

EUROCOMMERCE and EURO-FIET welcome the proposal of the Commission to give priority within the FORCE programme to projects resulting from the survey. They call on the members of the FORCE-EUROTECNET consultative committee to endorse this proposal.

The results of the survey should be disseminated as widely as possible and consideration should be given by EURO-FIET and EUROCOMMERCE. In this context EUROCOMMERCE and EURO-FIET will examine whether there are issues resulting from the survey which they would like to discuss in the framework of the social dialogue.

12 March 1993

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